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ABSTRACT

Shared leadership is a process empowering parents to exercise their civil rights, build leadership skills, and guide the design of policy positions and programs meant to improve their lives and the well-being of their children. Based on principles of family support practice, this book describes how to plan and host a 1- to 3-day shared leadership event resulting in a concrete consensus document such as a grant proposal, a program or business plan, or other document designed to promote change. Decisions are made by inclusive discussions built around critical questions specific to the group, neighborhood, or organization involved. The book's introduction describes the shared leadership process and the role of shared leadership events within that process, presents principles of family support practice, and identifies critical elements for shared leadership events: multiple stakeholders, cultural diversity, dialogue, and facilitation. The book is organized into three parts. Part 1 details the planning steps: building a planning team, writing an event description, coordinating communications, planning the logistics, and planning the event agenda. Part 2 presents the event itself in a step-by-step fashion: introductions and overview, panel/speakers, critical questions instructions, critical questions discussion, reporting and consensus session, drafting session, review of consensus document, and closing celebration. Part 3 focuses on follow-up after the event, including finding ways to use the consensus document. Tracking and planning charts, tip boxes, and other tools are included. Color coding is used throughout the book to facilitate finding planning tools and success stories specific to neighborhoods, programs, and state or national organizations. A budget worksheet and sample agendas for various types of organizations are appended. (KB)

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Shared Leadership Series

ED 481 895

Every Voice Counts

Holding a Shared Leadership Event to Make Decisions Together

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Holding a Shared Leadership Event to Make Decisions Together

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FAMILY SUPPORT America

Family Support America, formerly Family Resource Coalition of America, promotes family support as the nationally recognized movement to strengthen and support families and places the principles of family support practice at the heart of every setting in which children and families are present. By identifying and connecting individuals and organizations that have contact with families; by providing technical assistance, training and education, conferences, and publications; and by promoting the voice of families, Family Support America is taking family support to scale as the national strategy for ensuring the well-being of our children today and in the years to come.

For more copies of this publication, to join the nation's family support organization, or for more information, contact: Family Support America, 20 N. Wacker Drive, Suite 1100, Chicago, IL 60606, 312/338-0900, 312/338-1522 (fax), www.familysupportamerica.org

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Contents

Preface iv
By Virginia L. Mason

Introduction vii

Part One
Planning the Event 1

Part Two
A Shared Leadership Event: Step-by-Step 53

Part Three
After the Event 65

Appendices 69
Appendix 1: Budget Worksheet 70
Appendix 2: Sample Agendas 72

Preface

"We believe that family support principles reflect the basic tenets of a government of the people, for the people, and by the people." These words were written by consensus by a group of 120 parent leaders, program providers, and local, state, and federal officials from across the country. In December 2000, Family Support America convened these leaders at a national meeting, Shared Leadership: Forging a Consensus to Strengthen Families and Communities, in West Palm Beach, Florida, to draft a consensus statement and policy recommendations regarding the needs of families in the United States.

The Principles of Family Support Practice

1. Staff and families work together in relationships based on equality and respect.
2. Staff enhance families' capacity to support the growth and development of all family members—adults, youth, and children.
3. Families are resources to their own members, to other families, to programs, and to communities.
4. Programs affirm and strengthen families' cultural, racial, and linguistic identities and enhance their ability to function in a multicultural society.
5. Programs are embedded in their communities and contribute to the community-building process.
6. Programs advocate with families for services and systems that are fair, responsive, and accountable to the families served.
7. Practitioners work with families to mobilize formal and informal resources to support family development.
8. Programs are flexible and continually responsive to emerging family and community issues.
9. Principles of family support are modeled in all program activities, including planning, governance, and administration.

The principles of family support (see box, left) have never had been more relevant, and our work to embed those principles into public policy in multiple domains has never been more important. The mission of Family Support America remains true to these principles in our focused efforts to (1) promote, strengthen, and expand the family support movement; (2) foster the optimal development of children, youth, and adult family members; and (3) strengthen and empower families, neighborhoods, and communities. To these directives, spelled out in our strategic plan, our board of directors has voted to add an overarching principle: to promote parent and family engagement and leadership roles in all local, state, and federal activities and to develop tools and resources to ensure that parents actively and effectively engage in these roles.

Does it really make sense to have parents play equal roles in public policy advocacy and decision-making? Public officials worry ultimately about who votes and who pays. With parents as partners in developing policies and advocating for them, politicians hear the voices of those who directly experience the results of their decisions. Parents become their own best spokespeople, and professional advocates who have parents as their partners suddenly find new credibility for their voices as well. Imagine a state or municipal process to re-organize social, health and housing services, or a national organization deciding what new legislation to bring to Congress about childcare. These are places where sharing leadership with parents will determine the effectiveness of the strategies developed, the appropriateness of the new structures and rules, and the ultimate impact of the dollars being spent.

Parent engagement is a continuum from simple involvement in choosing services to planning programs to full participatory leadership. This definition calls upon us to empower parents to exercise their civil rights (such as voting and participating in political life), build leadership skills, and guide the design of policy positions and programs meant to improve their lives and the well-being of their children.

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On an individual basis, in a program setting, this might mean that during an intake interview, a staff person asks the parent to identify what is needed instead of reading a list of services for which she might be eligible. But eventually, as family support takes root as a philosophy and a common practice, it begins to change all of the usual ways of "doing business". In organizations and government systems, significant numbers of parents occupy governing boards and committees, set policies, and design programs. They decide on compensation for staff, content of parenting programs, eligibility requirements for public benefits, and regulations determining child protection mandates.

At first, these are radical steps with deep implications for the training and preparation of professionals and parents alike. However, these are the kinds of considerations that must be made when institutions that have traditionally treated parents as service clients begin to commit to family support. This is what Shared Leadership really means.

The original Shared Leadership Event in December 2000 was a way to put these principles into practice. From that pilot, Family Support America created a unique and powerful process so that others can do the same for their organizations, programs, communities, and other groups. We hope that these Shared Leadership tools will help you realize the transformational power that is possible when parents are leaders, engaged with other leaders in relationships of equality and respect.

Virginia L. Mason
President & CEO, Family Support America

"We believe that each individual in society can make an equitable contribution to the future generations of all of our children."

From the December 2000 Shared Leadership Consensus Document

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Introduction

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Introduction

December 3–5, 2000, Family Support America convened a meeting in West Palm Beach, Florida, with the goal of producing a true, powerful statement of what families and communities need to succeed. Parent leaders, family support program staff, government officials, policymakers, funders, and others numbering 120, participated in the symposium, Shared Leadership: Forging a Consensus to Strengthen Families and Communities.

From the planning of the original symposium to the writing of the Consensus Document, a broad cross-section of parents from 12 states were involved. All participants took part in a guided discussion that generated a document that everyone, including 60 parent leaders, agreed on. For many of them, this was the first time being in close deliberation with people so different from themselves. Program staff and policymakers said they had never been in such deep discussion with parents over issues so complicated and detailed. They gained a new respect for the parents and their capacity for analysis and leadership.

Definition: *Consensus Document*

A written statement that describes a group's common beliefs and agreements.

Parents reported being surprised at the others' deep commitment to and interest in their lives. Though many of them were heavily involved in local family support efforts, they came representing only themselves and their families. All worked together for three days, without evenings off, to ensure that the Consensus Document was completely representative. The Consensus Document they created is now used in crafting family-supportive public policy.

"Professionals had never been in such deep discussion with parents over issues so complicated and detailed."

Shared Leadership Event Participant

What This Book Is For

This book describes in detail how you can hold an event—the Shared Leadership Event—piloted by Family Support America at the symposium described above. What is radical about Shared Leadership? It is a process for making the shift that is at the core of family support: shifting the power and the responsibility for a community, county, state, and, ultimately, a nation to those who live in it. The definition of family support and the principles, which guide its practice, appear in this Introduction. Although family support programs nationwide ask for parents' input on decisions and involve them in pursuing family-supportive laws and funding, rarely are parents decision makers. It takes a special process to make that equal sharing happen. Shared Leadership is such a process. It is best to review the contents of this book thoroughly before beginning to plan and carry out a Shared Leadership Event. Once you understand the process, you can work together, following the step-by-step tools provided here.

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A Shared Leadership Event is a meeting that lasts 1–3 days, including all of the kinds of people who will be affected by its decisions. The intention of the meeting is to result in a Consensus Document that summarizes the decisions of the group. Decisions are made by inclusive discussions built around Critical Questions specific to your group, neighborhood or organization. These discussions allow everyone's viewpoints to be spoken, heard and included.

What You Can Achieve

The Shared Leadership Event and the Consensus Document that is created can help your group ensure that parents are leaders in:

- ➪ Designing programs
- ➪ Deciding what new issues to work on
- ➪ Pursuing specific laws, public programs, and systems changes
- ➪ Conducting outreach and community relations
- ➪ Planning how a business can strengthen the community
- ➪ Developing a vision for a new organization or coalition
- ➪ Creating a grant proposal
- ➪ Pursuing countless other family support activities

How to Use This Book

This book is for parent leaders and family support professionals, volunteers and community residents, funders and others to create a respectful and inclusive process with meaningful results. It should be useful for the following types of groups. (Look for color-coding throughout the book to find specific tips for each setting.)

1. Neighborhoods seeking transformation

The Shared Leadership Event brings all stakeholders together –parents, agency and program staff, policymakers, and others–to:

- ➜ Use their different understandings and resources for a common purpose
- ➜ Change the ways in which they are connected to resources and to one another
- ➜ Promote an understanding of the neighborhood by those who do not live there
- ➜ Share power and respect the authority of residents
- ➜ Build parents' skills, relationships, and knowledge so that they can take on increased responsibility
- ➜ Make parent involvement real in dreaming the vision for the community, assessing needs and resources, and developing and evaluating programs

2. Local programs that provide family support or other services

Shared Leadership shifts the role of families from powerlessness to self-direction, competence, and control. Local programs using Shared Leadership can achieve the above results as well as increasing outreach and use of their services, for when families are involved in program planning, they:

- ➜ Want to experience the results of their planning
- ➜ Know that the programming fits their needs and interests and was chosen by them
- ➜ Tell others that their program is up and running

3. National or state organizations serving families and children

Engaging in Shared Leadership demonstrates respect for parents' leadership roles in their families and beyond. Through this process, the organization can develop:

- ➜ An agenda that fits the strengths and needs of families and has a strong base of support that can be mobilized
- ➜ Positions that have legitimacy
- ➜ Programs that are used and sustained
- ➜ Funding requests that are grounded in data and complete information
- ➜ Policies that are just

To help you carry out a Shared Leadership Event in your particular setting, the book follows three fictional organizations—each corresponding to one of the settings above and color-coded to match—as it carries out the Shared Leadership Process. Their stories are described in the "We Did It!" boxes throughout the book:

1. **Hope Neighborhood Association:** A ***neighborhood*** seeking transformation is using this community organization to carry out its goals and is working on a grant proposal.
2. **The Family Center:** This ***local program*** is a family support center that is developing an early childhood program, which it will deliver in a school.
3. **We the People:** This ***national organization*** is working on a position paper on policies to strengthen families.

Shared Leadership is a process with consistent principles and practices, but it is not a cookie-cutter approach. These examples are simply designed to help you imagine how it will work in your situation. You will have to adapt each and every step to your own goals, budget, group members, calendars, and other resources.

Definition: *Inclusive and mutual dialogue*

Real discussions that include every voice that needs to speak, where people can share freely, and where they are truly heard.

This book describes a single event that begins—or perhaps is a turning point in—a Shared Leadership Process. This single event may teach you techniques and models to use in many other situations. You might ask new questions about who needs to be at the table at other events. You might become more aware of how the details of planning affect the outcomes of meetings. You might set new standards for how you invite people and respond to their needs when you want them to be involved. You might follow up a Shared Leadership Event with working groups, governance structures, and other meetings and activities. The event is the beginning of a change. With new relationships, new ideas, new voices, and new information, you may find that the process of change, of truly sharing leadership, is unstoppable.

Conducting a Shared Leadership Event and producing a Consensus Document does not complete the process of developing Shared Leadership. It is very important to follow up with meaningful communication, involvement with advocacy and program activities, and changes in governance and decision-making structures that firmly implant parents and other stakeholders permanently in shared leadership roles.

Before You Plan—Committing to Shared Leadership

Before you begin to plan your Shared Leadership Event, you must first understand and work from a commitment to the model of Shared Leadership and the principles family support practice, which are the guiding force behind the event and its intended outcomes.

Family support is:

- **A set of beliefs** and an approach to strengthening and empowering families and communities so that they can foster the development of children, youth, and adult family members
- **A type of grassroots, community-based program or center** designed to prevent family problems by strengthening parent-child relationships and providing whatever parents need in order to be good nurturers and providers. These programs are numerous and exist across the country and are funded through a variety of resources.
- **A shift in human services delivery and practice** that encourages public and private agencies to work together and to become more preventive, responsive, flexible, family-focused, strengths based, and holistic—and thus more able to achieve results
- **A movement for social change** that urges all of us—policymakers, program providers, parents, employers, and others—to take full and complete individual and collective responsibility for improving the lives of children and families

The Principles of Family Support Practice are:

1. Staff and families work together in relationships based on equality and respect.
2. Staff enhance families' capacity to support the growth and development of all family members—adults, youth, and children.
3. Families are resources to their own members, to other families, to programs, and to communities.
4. Programs affirm and strengthen families' cultural, racial, and linguistic identities and enhance their ability to function in a multicultural society.
5. Programs are embedded in their communities and contribute to the community-building process.
6. Programs advocate with families for services and systems that are fair, responsive, and accountable to the families served.
7. Practitioners work with families to mobilize formal and informal resources to support family development.
8. Programs are flexible and continually responsive to emerging family and community issues.
9. Principles of family support are modeled in all program activities, including planning, governance, and administration.

The process described in *Making Room at the Table: Fostering Family Involvement in the Planning and Governance of Formal Support Systems* (Family Support America, 1997) is a first step in developing commitment to family support among the variety of stakeholders needed to strengthen children and families. Working through the activities in *Making Room at the Table*, agency directors and staff, policymakers, parents, and others work to come to a common understanding of why Shared Leadership is desirable and important. This can lay important groundwork for a Shared Leadership Event.

The Principles of Family Support Practice commit us to new models of relating to one another in the service and support context. Family support, taken to its logical conclusion, changes the way we structure and manage that relationship. It suggests that once you have put in place the respect and dignity that families deserve, once you have committed to reflecting the primary role of parents in guiding the lives of their families, the choices of what programs to provide, who will receive services, how they are regulated, and any number of other Critical Questions, must be placed in the hands of the parents who must make use of these services in leading their lives.

Stemming from the Principles of Family Support Practice, the idea of Shared Leadership assumes that families are the central structure of society. This means that the family develops as part of a complicated environment we call a community and that the well-being of the larger society depends ultimately upon the strength and health of that single, central component. Parents as leaders of this family unit bear the primary responsibility for their children, and the community and its leadership have the obligation to support that role. Parents, therefore, must fully share the responsibility for the health and well-being of their own families, their communities, and their society. It also means that the larger community must take responsibility—in a reciprocal relationship—for the strength of families and well-being of children.

What Makes a Shared Leadership Event Powerful

The Shared Leadership Event requires several critical ingredients:

1. Multiple Stakeholders

Definition: *Multiple Stakeholders*

People who see an issue from different viewpoints—for example, as consumers, as providers, or as policymakers—and who each have a reason to care about the result.

A Shared Leadership Event involves **multiple stakeholders**. This means that people with different points of view are involved in the planning, design, and conduct of the meeting, and in the production of a Consensus Document. You should include all the voices that need to be heard. That does not mean that anyone and everyone should come. It means that from every perspective, there will be enough voices present to be sure that all critical angles are understood and considered. With careful attention to who is invited, you will hold an event that is not only fair and respectful, but one that will produce a realistic and well-informed document.

2. Cultural Diversity

Definition: *Cultural Diversity*

The inclusion of people from different life experiences that might include race, gender, national origin, sexual orientation, and economic class.

A Shared Leadership Event is **culturally diverse**. In other words, it is not enough for people to represent different professional viewpoints and those of residents, parents, taxpayers, business people, etc. In order for the process to be real and the result to be reliable, people whose life experiences are different will also provide very different opinions and ideas. Under the principles of family support, the process and the product must be culturally competent—and no one can speak for different cultural perspectives as well as people who live it.

3. Dialogue

"[Shared Leadership] allowed us to dialogue and hear what others are saying. The child welfare professionals raised different issues that normally I would have been fighting them on. But hearing why they held those views, I realized the importance of dialogue to make policies that don't hurt."

Anna Green
Parent Leader
Shared Leadership Event
Participant

A Shared Leadership Process is a conversation. The usefulness of having culturally diverse stakeholders, and stakeholders from various viewpoints, is that you have lots of voices and lots of listeners. In a mutual dialogue, everyone has something important to say, and as people hear these points of view, they learn, they shift their thinking, and they incorporate new opinions and ideas into their expectations. This means you will need to include small groups to gather and speak directly with one another.

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4. Facilitation

A Shared Leadership Event is directed. This means that it is not only a conversation, but one that is meant to get us somewhere. We are seeking not only to understand one another, but to produce a statement that can summarize our agreements, a Consensus Document. For this reason, the dialogue should be facilitated. In the process we are recommending, it is not facilitated by outside consultants, but by people who are your peers and care passionately about the issues you are discussing. Facilitators guide groups of speakers through a set of questions that point the dialogue in the direction of a shared result.

Part 1 of this manual gives the details of planning needed to produce a powerful event. Part 2 takes you through the event itself in a step-by-step fashion. You should review the entire manual to see how all the pieces fit together before you begin.

Definition: *Facilitated Discussion*

Discussion that is guided by individuals whose responsibility it is to help the group members hear each other and reach their goal

"The diversity was a big plus, and it was exciting to see people coming from different parts of the United States and different backgrounds, cultural and socioeconomic, all in one room, demonstrating respect for one another."

Adriana Pecina
Ewing Marion Kauffman Foundation
Shared Leadership Event Participant

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Part One

Planning the Event

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Part I of this manual walks you through the details of planning a successful Shared Leadership Event. But before you begin to plan, look at Part II, which takes you through the Shared Leadership Event step-by-step. Having a vision of the end result will help you in your planning.

Planning Timeline

Below is a summary timeline of the tasks described throughout Part I of this manual. You may want to build your own timeline, adding steps unique to your situation.

Timeline	Action	Page No.
At least 8 weeks before event (Longer for statewide, national, or other large event)	❑ Build Planning Team ❑ Hold first Planning Team meeting ❑ Write event description ❑ Build invitation list ❑ Create invitation and RSVP form ❑ Set event dates ❑ Secure location and lodgings	3 10 15 17 23 27 28
1 month before event	❑ Create invitee/participant database ❑ Send invitations and RSVPs ❑ Distribute event description ❑ Assign working group Facilitators ❑ Appoint Moderator ❑ Assign Drafting Group ❑ Select and invite speakers	23 23 24 42 42 47 47
3 weeks before event	❑ Continue outreach and manage RSVPs ❑ Finalize arrangements with place, food, etc. ❑ Write event agenda ❑ Send job descriptions to Facilitators ❑ Send preparatory information to participants ❑ Hold Planning Team progress meeting	24 30 39 43 48 48
2 weeks before event	❑ Finalize list of participants ❑ Create name badges ❑ Finalize agenda ❑ Assign participants to Work Groups	23 23 39 42
1 week before event	❑ Schedule pre-event Planning Team meeting ❑ Check every detail with everyone! ❑ Train Facilitators	4 4 44

Step 1: Build a Planning Team

The success of your event and of its output depends largely on this simple step. The key to planning a Shared Leadership Event is to create a strong and committed Planning Team whose members listen to and support each other and communicate regularly.

Many kinds of events are planned by a small group of professional staff. But a Shared Leadership Event is planned by a group of diverse stakeholders. Critical planning decisions are made by the people who will be affected by them. Although it is very inclusive, the planning process can be efficient, if you follow these tips:

- To keep numbers low, Planning Team members can represent different groups at once–but they need to really understand that they "wear different hats."
- An inclusive Planning Team includes the basic groups of people you want to come to the event–not every possible viewpoint held by members of those groups.
- Members of the Planning Team can have different levels of involvement, from handling daily details to setting the overall shape and attending periodic meetings

A. Choose Members

(Use Tool 1) The big difference between a Shared Leadership Event and many traditional meetings and decision-making processes is the involvement of parent leaders in key decisions. This process respects the leadership of parents to set the agenda and determine the future of programs and policies that are intended to affect their lives. It gives parent leaders significant roles at all stages of the process–planning, conducting, and following up on the event.

Your team should be representative of:

1. Those who will provide **resources** for the event–with money, leadership, endorsement, or other things that make it possible
2. Those who will **manage** the event by handling the logistics and process
3. Those whose **work** will be **affected** by the results of the event
4. Those whose **lives** will be **affected** by the results of the event

Choose people who are willing to put in the time, work hard, fully share responsibility for the success of the event, and fully support your intention to be inclusive and collaborative. When you invite people to join, be sure to explain:

- The purpose of the event
- How much of their time will be needed
- The philosophy behind the Shared Leadership Process

You can share parts of this book to answer some of these questions.

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B. Set Member Roles

(Use Tool 1) With each member, decide whether he or she will be:

- An advisor
- A working member

Also decide which committee(s) he or she will be on:

- The Description Committee writes a description of the event for public circulation.
- The Communications Committee plans outreach for the event.
- The Logistics Committee plans details such as location and transportation.
- The Agenda Committee develops the agenda for the event.

Working members do the research, writing, designing, negotiations, and other day-to-day tasks, calling upon the advisors for support and contacts. Advisors review their committees' plans and sometimes offer suggestions for revisions. Following their approval, the committees bring their work to the entire Planning Team for final approval. Tool 1 shows guidelines for who should be working members and advisors.

Each committee requires at least two working members and two to three advisors.

Each of the four committees carries out one of the four major steps in the process of planning a Shared Leadership Event. See pages 13-51 for detailed descriptions of these steps.

Planning Team Membership
Version 1: Neighborhood Seeking Transformation

Key Resident Leader(s)
Include at least one. If there are different groups of residents, each should be represented.

- _____
- _____
- _____

Future Resident Leaders
Strong individuals not yet leaders of institutions but respected and followed in neighborhood

- _____
- _____

Family Members
May or many not be covered above

- _____
- _____

Funders

- _____
- _____

Key Nonprofits Working in Neighborhood (name staff)

- _____
- _____

Key Public Agencies Working in Neighborhood (name staff)

- _____
- _____

Others
Others whose support may be needed to carry out the vision agreed to at the event

- _____
- _____
- _____

Place a "W" to the left of working members and an "A" to the right of advisors. Working members should include staff from organizations supporting the event, resident leaders, and family members who are parent leaders in community.

Note: You can always add Planning Team members as you go along, if you find a group not well represented.

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Planning Team Membership
Version 2: Local Program

The Planning Team should be half parents and half staff.

Parents with Children Eligible for New Program

- _____
- _____

Parents Now Involved in Program(s) at Center

- _____
- _____

Key Residents Leaders
Residents whose participation will encourage others to attend

- _____
- _____

Key Public Agencies (name staff)
Staff whose participation is needed for the event and the new program

- _____
- _____

Center Staff
Staff from your organization who have enthusiasm for the event

- _____
- _____
- _____
- _____

Place a "W" to the left of working members and an "A" to the right of advisors. Each category should include both.

Note: You can always add Planning Team members as you go along, if you find a group not well represented.

Planning Team Membership
Version 3: National or State Organization

Category 1: Host Organization

Staff

- _____ • _____
- _____ • _____
- _____ • _____

Parent Leaders

- _____ • _____
- _____ • _____

Board Member(s)

- _____ • _____

Key Funders (list staff)

- _____ • _____

Category 2: Partnering Organizations (national, state, local)

Staff

- _____ • _____

Board

- _____ • _____

Parent Leaders

- _____ • _____

Category 3: Key Individuals

Leader(s) Whose Support Is Critical for Attendance

- _____ • _____

Policymaker(s) Who Could Use Output of Event

- _____ • _____

Place a "W" to the left of working members and an "A" to the right of advisors. Working members should include staff from host organization (this will likely be the majority), staff from partnering organizations, and several parent leaders.

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Step 1: Build a Planning Team **Neighborhood**

Hope Neighborhood Association staff recruited a Planning Team including:

- Respected, active residents (who make up the majority)
- Local family members who might use services and programs
- Funders
- Key non-profit and public agencies
- Leading city official

One full meeting of the Planning Team was held at a neighborhood church. They decided which pieces of work would be discussed as a whole and pieces they would cover in committees. Based on when each piece of work needed to be done, they planned their schedule of meetings. They were careful to offer all Planning Team members transportation to every meeting, provide childcare for meetings, and use mail or hand delivery if members did not have access to the technology that organizations provide to staff members. The group met together at least three more times: a progress meeting halfway through, a wrap-up meeting just prior to the event, and a follow-up meeting after. Committees met more regularly, depending on their responsibilities.

Neighbors needed to be very clear about why they were developing this vision and how the product would be used when completed. Each participant in planning wanted to know why he or she was participating and what was expected of him/her. Hope Neighborhood Association began inviting people to plan this meeting three months before the event; at their first meeting they scheduled the event for two months later. If they hadn't been offered the church fellowship hall and classrooms, they would have needed a little longer!

24 BEST COPY AVAILABLE

Step 1: Build a Planning Team **Local Program**

The Family Center, a local family support center planning a new program, created a Planning Team made up of:

- Local family members eligible for program
- Parent with child eligible for child development component
- Parent with child in school
- Parent who will draw others
- School staff member (whom principal agrees will represent school)
- Funders
- Other providers important to program success

The team did most of their planning in person. Most neighborhood parents are not accustomed to communicating through electronic means. They used smaller working groups to plan different pieces and make scheduling easier. If a parent was involved in several committees, they scheduled the meetings together so attendance was easier–and they provided childcare each time! Meetings fit everyone's schedule. They used mail and phones more than email and fax to share information, and allowed extra time for that. The whole group met 3 more times: at a mid-point, just before the event, and just after for follow-up.

Planning Team members each took specific committee assignments and did a lot of their work in meetings–they enjoyed getting together and treated the meetings as working sessions–designing and drafting and organizing together instead of as individual tasks. Because the school offered their auditorium and classrooms for the event, and everyone rolled up their sleeves and got the work done fast, they were able to pull the whole thing together in less than 6 weeks!

Step 1: Build a Planning Team **National Organization**

We the People, a national organization, brought together a planning group that included:

- Parent leaders from family support and child welfare programs
- Parent leaders from advocacy organizations
- Community activists
- Staff and Board from partner organizations
- We the People Staff
- We the People Board member
- Key funders
- Representative from Congressional office
- Other leaders whose support is critical for attendance

Most of the logistical work was be done by their own staff, but they included and asked for help from each of the above.

The organization held one whole Planning Team meeting by conference call and identified committees for various tasks. They assigned responsibility for each aspect of planning and agreed on how information would be shared. Most everyone had access to email so this was the preferred communication tool, with fax and phone used for the two who did not. They scheduled two more conference calls at a mid-point and just before the event. All Planning Team members were asked to arrive early for the event to do a wrap-up meeting and a follow-up meeting was held immediately after the event.

National (and statewide) events like this one require a strong commitment of responsibility from partnering organizations and policymakers, funders and parent leaders. We the People made clear what was needed from each partner (location, funding, guest lists, staff support, and planning time). Long-distance planning takes more time: they began planning the event at least 3 months ahead of time but wished they had started earlier!

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C. Hold the First Planning Team Meeting

1. Logistics

Your Planning Team may consist of friends who meet weekly in the neighborhood or complete strangers spread across the country. You may drop notes in door slots or hold conference calls and send e-mails. But most likely, Planning Team members will have different access to e-mail, fax, and telephone and different hours of availability.

Parent leaders may not have computers, fax machines, or phones. They may need to be reimbursed for phone calls or be invited to an office for long-distance conference calls. Find a way to meet that is sensitive to and respectful of all members. Ask every member what he or she will need in order to fully participate in meetings and review documents.

Both professionals and parents may have severe time limitations. Balance the need for spontaneous, meaningful discussion with the need to meet other responsibilities. The best way to make sure everything gets done is to keep the goals realistic and to start planning early. Schedule conversations for the future as needed.

Definition: *Agenda*

A list or outline of the things you will talk about and accomplish in a meeting.

For more help making sure your meetings respond to everyone's needs, see *Putting Parent Engagement Into Action* (Family Support America).

2. Agenda

(Use Tool 2) Develop an agenda for the first Planning Team meeting in advance. Tool 2 is a sample agenda. Although it can change to suit the group–for example, you may want to spread it over more than one meeting–all of the items need to be addressed to have a successful Shared Leadership Event. You should be able to cover all of the items in two hours (by phone) or two and one-half hours (in person).

3. Staffing

For your Planning Team meetings, you will need:

- A Facilitator: Takes group from one item to next and make sure agenda is covered
- A Recorder: Writes down decisions made, tasks and deadlines, and general discussion topics
- A Task Master: Creates Task List of all commitments agreed to at the meeting (including task, deadline, and person(s) responsible)

Sample Agenda: First Meeting
Shared Leadership Event Planning Team

Length of meeting: 2 hours by phone, 2.5 hours in person

I. Introductions

A. Each person takes one minute to give name, organization or other affiliation, and reason for wanting the event to happen (keep it very short!)

II. Planning Team Structure

A. Who will serve on the work group? (meets regularly)
B. Who will serve on the advisory circle? (meets twice more after this)
C. Who will be on planning committees? (include both of the above)
- The Description Committee writes a description of the event for public circulation.
- The Communications Committee plans outreach for the event.
- The Logistics Committee plans details such as location and transportation.
- The Agenda Committee develops the agenda and content of the event.

III. Goals for Shared Leadership Event

A. What is our purpose in holding event?
B. How will we use the written output of the event?
C. How will we know that this event has been successful?
Take turns saying one thing about your ideal Shared Leadership Event.
Consider:
- Is it important for people to form new relationships?
- What is most important to accomplish in the limited time?

IV. Committee Workplans

The whole Planning Team outlines each committee's work:

A. Description Committee
- What general ideas should be in the description?
- Who will contribute to it?
- Who will draft it?
- When will it be done?

B. Communications Committee
- Who will keep the list of recommended Shared Leadership Event participants?
- How will all Planning Team members give names to that person?
- Who will make the invitations, and when will they be done?
- Who will make and update list of attendees?
- Who will answer questions from invitees and send updates on logistics?

C. Logistics Committee

- Who will create the RSVP form to go with the invitation?
- How will we select a location and date?
  - Are we ready to choose now? Should the committee research and report back?
- Who will reserve the meeting place and communicate with the owners about ongoing space needs?
- How will the committee make payments (stipends, etc.)?
- Who will handle food, childcare, transportation, and comfort issues?
- What will the event cost and where will the money come from?
- Who will be the troubleshooter?

D. Agenda Committee

- Who will develop the agenda for the event?
- How will Work Group Facilitators for the event be chosen and recruited?
- Who will prepare the trainers?
- Will the output be completed by the end of the event or distributed later?
- Will we have speakers? If so, who will choose and recruit them?

V. Closing review

A. Review Task List

B. Set dates for next meetings for each committee and for the whole Planning Team.

Thank each other and celebrate the great start!

Step 2: Write an Event Description

The activities in this step are the responsibility of the Description Committee.

A. Determine the Goal, Products, and Outcomes

In this step, you answer the following questions briefly:

1. What is the goal of the event?
2. What products do you want to produce through the event?
3. What other outcomes do you want to achieve through the event?

You may want to start by answering the second or third question. If you plan to use the event to create a grant proposal for a child development program, you might say that the goal for the event is "to achieve support for a child development program."

> Announcing a goal can lead to the feeling that your neighborhood, program participants, or constituency has been promised something. Be careful to create goals on which your Planning Team can deliver.

When answering the second question, think about how you want to use the Consensus Document (see page ix) that results from the event. The Consensus Document can be one of many things: a policy statement, a vision for a large project, a description of a new program.

Outcomes can include concrete steps, but equally important can be new or stronger relationships, building excitement and trust, identifying new resources, and the emergence of new leaders. What is important to you?

> Sharing leadership means allowing each person to speak and to listen. This can take considerable time. Adjust your goals to fit the time available.

This is the time to consider the whole Shared Leadership Process and what you can achieve with a Shared Leadership Event. Having realistic expectations of the event helps make sure everyone is satisfied with the results. The three scenarios below give examples of realistic event goals, products, and outcomes.

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Step 2: Write an Event Description **Neighborhood**

Hope Neighborhood Association developed the following description of their Shared Leadership Event:

Goal: To develop a vision for an ambitious, grant-funded, multi-year community change process

Product: A statement that details the vision of a renewed neighborhood and the kinds of supports and systems that people want for use in proposals, public relations, and recruitment

Other outcomes: To mobilize people from across the neighborhood to get behind a common agenda, to reduce competition and increase cooperation so everyone wins, to understand and trust one another as a basis for the hard work ahead

Step 2: Write an Event Description **Local Program**

The Family Center developed the following description of its Shared Leadership Event:

Goal: To begin a process for creating a new family support program at the local school, shaping the program and beginning to identify the resources to pay for it

Product: A description of the program people want—and will attend and help—and a description of future planning activities

Other outcomes: Improved relationships between school and community organizations, agencies, parents and other community residents; and increased interest in the program

Step 2: Write an Event Description **National Organization**

We the People developed the following description of its Shared Leadership Event:

Goal: To push for a national advocacy effort to encourage all lawmakers to look for ways to strengthen families

Product: A draft document summarizing the kinds of policies the participants want to encourage, one that can be useful to all of them in their local, state and federal advocacy efforts

Other outcomes: New partnerships among advocacy organizations, new relationships between professionals and parent leaders, new understanding of the issues from all perspectives, and new energy and resources to build the movement

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B. Draft the Description

(Use Tool 3) Choose one individual, with a small group of helpers, to write a short paper that explains why you want to hold this event and what will happen at it. (Think of it as a long letter. Tool 3 provides an outline for your statement.)

It is helpful to think about what you will do with the event description and who will read it. You can use it to:

- ➪ Give people an opportunity to become involved in planning the Shared Leadership Event
- ➪ Get people excited about coming to the event
- ➪ Encourage other organizations and individuals to help host the event
- ➪ Convince others to fund the event
- ➪ Get people interested in the product of the event beforehand, including the media
- ➪ Explain your commitment to the concept of Shared Leadership and your organization's guiding values

Definition: *Event Description*
A short document summarizing the Shared Leadership idea, what you hope to accomplish at your Shared Leadership Event, and who the event is for—in a way that persuades people to get involved.

C. Revise and Get Approval

(Use Tool 3) Circulate the draft for review within a small planning committee, then throughout the full Planning Team, before placing it on letterhead and distributing it to others. Once it is circulated, it can be difficult or impossible to change. Invite your partners, prospective new partners, and other important individuals to review and respond to the description. Make sure key partners approve of it before you send it to a prospective funder or the media. Ideally, this review process will generate new ideas and differences of opinion—the beginnings of a true consensus process.
Outline for Event Description

Leave extra time for mailing or delivering the draft to Planning Team members without fax machines or e-mail.

Outline for Event Description

Introduction

A. Clear statement that we want to hold a Shared Leadership Event
B. Decisions we plan to reach, by consensus
C. Topic the event will focus on
D. The desired product

Background on Our Organization

A. Short history
   - Whom we serve, the work we do, or who our members are
   - Past accomplishments related to this event and topic

B. How this topic and event fits into our mission
C. Partners and their contribution
D. How this idea came about

Shared Leadership

A. What it means to us
B. How it fits with our organization's guiding values
C. Why we are committed to making decisions this way

Event Product and Outcomes

A. Consensus Document and how it will be used in future
B. Other outcomes intended
   - Relationships
   - Mobilization
   - Other

Who Will Participate

A. How the guest list was constructed
B. Which voices we are seeking

Logistics and Support

A. Dates, times, location
B. What will be provided (transportation, food, childcare, stipends, etc.)
C. How people can get involved
D. Acknowledge partners and funders (update this as partners and funding are added)

Step 3: Coordinate Communications

The activities in this step are the responsibility of the Communications Committee.

A. Build a Complete Guest List

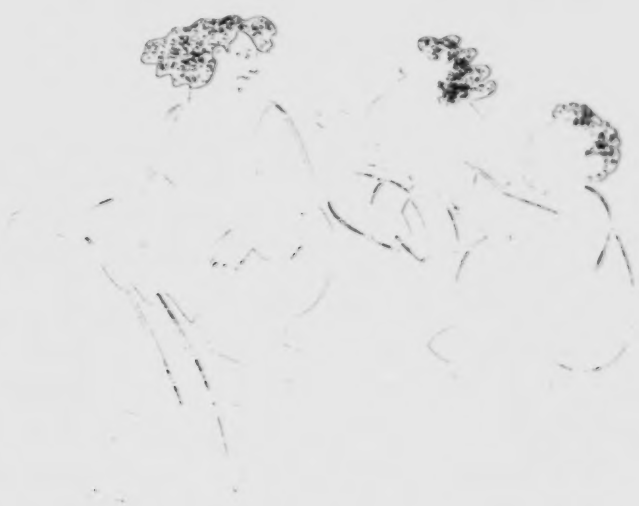
Steered by the Communications Committee, the Planning Team must decide who should be invited. Although brainstorming names is important, it is not the first step. Instead, begin by thinking about the "voices" that must be heard.

Different people represent different points of view, ways of thinking, life experiences, and kinds of education and knowledge. People think differently depending upon where they live, what work they do, and how they are connected to the work you are doing. You might need the voices of program experts and parents, policymakers and administrators, business people, and volunteers. Sometimes we call these people "stakeholders" because each has a "stake" in the result—in other words, the results will affect them. We also call them "voices" because it helps people think of categories or groups of people rather than the individuals that represent them.

1. Find the Right Mix of Voices

(Use Tool 4) At a Planning Team meeting, ask the team members to imagine all of the voices they want to hear at the event—then begin to discuss who those kinds of people are. Review the desired goal, products, and outcomes:

- ➜ Which groups of people will make the goal, products, and outcomes possible?
- ➜ Do you need to hear from particular organizations or professions?
- ➜ Do you need to hear from parents who have had difficulties with the systems intended to serve them?
- ➜ Do you need to hear from parents who were helped by certain programs?



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Talk about the diversity of everyone affected by the decisions you will make at the Shared Leadership Event. Each group must be meaningfully represented in proportion to their presence in the community you intend to serve or represent. This includes diversity in terms of:

- Ethnicity
- Race
- Economic level
- Religion
- Sexual orientation
- Gender
- Age

In some combination or another, your guest list may include:

- Parent leaders
- Service providers
- Policymakers, both elected and appointed (local, state, national, as appropriate)
- School administrators
- Local program administrators
- Health care providers
- Community leaders and advocates
- Community residents and resident leaders
- Program participants
- Other stakeholders

Finding the Right Mix of Voices

1. Who will ultimately be affected by the results of the meeting?

- ➜ If there is a program to be planned, who will be using it?
- ➜ If there is a policy being developed, whose lives will be changed if it were to become law or regulation?
- ➜ If there is an effort underway to change the neighborhood, who will be living in it?
- ➜ [Create your own question here that fits your own circumstance.]

2. Who will be needed for us to understand the situation accurately?

- ➜ Is there professional knowledge that we need?
- ➜ Is there past experience that we need to know about?
- ➜ Who can tell us what life is really like under the current circumstances and what it would be like if we changed the way things are?
- ➜ Who are the "experts" about the subject or about the neighborhood?

3. Who will make possible the future changes we want to see—or stand in the way?

4. Who will have to do the work of following up with our ideas and making things happen?

5. Who will evaluate our results—or let us know whether our plans have made a positive difference?

6. Add questions that are special to your situation and ask members of the Planning Team to consider them.

2. Decide How Many People to Invite

How many people will you invite to the Shared Leadership Event? There are many things that factor into the number:

- What number would create an efficient and effective group?
- How many people are needed to get the right mix of voices?
- How many people will want to be involved?
- How many people can you afford to invite?

You may have to change the number somewhat as you continue to plan. There may be people who want to attend and would be upset by being left out. The budget developed by the Logistics Committee may reduce or increase the event capacity. (Keep in constant communication with the Logistics Committee and keep negotiating.)

As the event comes into clearer focus, you may find people you didn't know before whom you want to include. While you do not want to be rigid about your limits, make sure you can afford to pay for them all to attend.

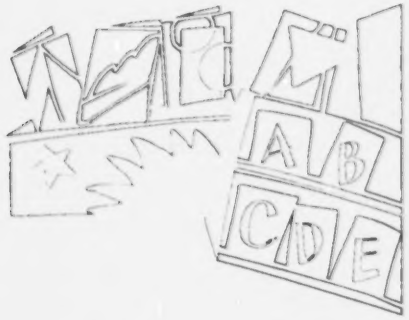
3. Complete the Voices Matrix

(Use Tool 5) The Voices Matrix helps make sure those invited and those planning to attend represent the right mix of voices. It isn't a necessary part of the process, but it enables you to see the exact number of attendees and invitees who represent each group.

Fill in the yellow and green boxes based on Tool 4 and your "Finding the Right Mix of Voices" discussion, above. Then, share the matrix with the full Planning Team and brainstorm individual names that fit into each box, filling in the purple boxes. As you build your list, this matrix will begin to show you where your gaps are; you can organize specific outreaches to fill them.

To genuinely share leadership, at least half of the people invited should be parents and community leaders who are in the neighborhood, participate in your program, or are represented by your organization.

Focus as well on a few individual voices that will be important simply because of their influence on others. Some people, when they speak or urge others to act, seem to draw others toward their cause. Your Planning Team members may know of other key individuals—possible future funders or philanthropic leaders (respected residents who give money for the good of the community), decision makers, parent leaders, opinion leaders in your field or community—without whom you cannot reach your desired results. Add them or their representatives to the matrix under the appropriate category, so you can see the range and diversity of your entire list.



Matrix of Voices

Green fields: What other groups joined by shared background or experience will be affected by the decisions made at the Shared Leadership Event?

Grey fields: What other groups joined by shared profession or activities will be affected by the decisions made at the Shared Leadership Event?

If the group wants to track which—or just how many—people from these groups have been invited and sent in RSVPs, enlarge the chart below and fill in the blue fields while entering names into the invitee/participant database. Or ID numbers identifying individuals in the invitee/participant database can be used here to save space. This matrix can even be part of the invitee/participant database.

	Parent leaders	Program providers	Policy-makers	Other		
Races, ethnic groups:						
Male						
Female						
Ages						
Youth						
20-40						
40-65						
Elders						
Religious groups:						
Other						

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4. Create an Invitee/Participant Database

Create a database of all of the people the Planning Team decides to invite. Because of the wide range of software options, we are not outlining a specific form here. Whatever program you choose, it should include the following information, in addition to special fields that you may need to add:

- Name
- Address
- Phones (work, home, mobile)
- Fax number
- E-mail address
- Organization (the organization with which the individual is affiliated, if applicable)
- Role (such as a staff title, parent, other program participant, or volunteer)
- Referral: If one person recommended inviting this person, who was that?
- Sent invitation—yes or no
- Returned RSVP form—yes or no
- Will attend—yes or no
- Needs (gathered by the logistics planning committee: childcare, dietary, travel, etc.)
- Follow-up involvement

Choose one person to be responsible for managing the database. He or she will enter invitee information, including that from returned RSVP forms. He or she will also print labels, lists, name tags, etc. from the database as other working groups need them.

Managing the database is a very important communications job. It enables you to reach those invited efficiently, keep track of their specific needs and concerns, and keep them well informed. After the event, this list will continue to be important in helping you communicate the results and take the next steps.

B. Market the Event

1. Send Invitations and Follow Up

(Use Tool 6) Using the invitee/participant database, send out a written invitation to all invitees. Use the Event Description written in Step 1 as the basis for your invitation. Give them a simple process or form for responding to the invitation. Remember, some participants do not have phones, fax machines, and e-mail.

Once participants have registered for the event, send them a confirmation letter to let them know they have been added to your participant list. Enclose a complete registration form that they are to fill out, which provides you with the information you need to plan every detail of the event. Tool 6 is a sample registration form. You will need to modify it for your Shared Leadership Event—particularly if your event does not involve staying overnight.

2. Conduct Outreach

The size and topic of your event determine how much outreach you need to do. Sometimes sending out an invitation—if you are announcing the planning of a new exciting program or community change project, for example—creates so much interest that you will fill your event with the responses alone. Other times, such as when the topic is a challenging policy problem, or when a community has become tired of promised programs that didn't serve them, it will take some direct follow-up and personal persuasion, even perhaps some media attention or "celebrity" leadership.

Many people will not come to the event unless they hear from a specific Planning Team member. He or she might be a parent leader they trust or the director of an organization they believe in—it is crucial that they hear from that person.

Outreach is everyone's business, and every Planning Team member and his or her colleagues is responsible for making the event a success. Agreeing on this at the beginning saves a lot of stress later on.

Always use your event description in your outreach to make sure everyone understands the nature of the event and its goals. For the media, this sends a clear, consistent message, which is important in getting positive attention. For other stakeholders, this attracts those who are invested in the intended outcome of the event. For example, a description that states that the event is geared toward creating a vision statement may discourage participation from those seeking only to air complaints, not to envision a solution.

C. Document the Event for Future Promotions

Having audio or video recordings of the speakers or any other parts of the event can help you communicate its success in the future. If you want these recordings, plan early and work with the Logistics Committee. To get useable recordings, you will have to have the service provided professionally by an audio-visual company or the in-house AV services of the hotel, college, or university where the event will take place. Recording usually takes at least a month to arrange.

A cheaper alternative is to have a Planning Team member or community member take photographs using a regular camera with a flash—but for sound recordings, professional equipment and services are needed.

Registration Form
Shared Leadership Event

Due:

Please complete page 1 of this form and return it by_____(date)

to: _____(name, address, fax, e-mail).

Page 2 of this form contains all of the details of the Shared Leadership Event. Please keep it.

1. Name: _____
2. Title (write Parent Leader if you are a parent leader): _____
3. Organization (if applicable):_____
4. 5-6 sentence biographical statement to be printed in event materials.
   (If not received by due date above, it will not appear in materials.)

5. I will arrive at the event at_____(time) on_____(date).
6. I will leave the event at_____(time) on_____(date).

Lodging

7. I will share a room. (no charge to you) ❑ Yes ❑ No
8. I would like to share a room with:_____
   (Optional–we will pair participants if no answer.)
9. I need my own room. (You will be charged $____ per night.) ❑ Yes ❑ No
10. I need a non-smoking room. ❑ Yes ❑ No
11. I have the following special needs (dietary, wheelchair accessibility, etc.):

Expenses

12. I have a credit card to present at check-in. ❑ Yes ❑ No
    If you circled "Yes" for question 7, your card will be charged only for calls, meals, or other charges you make to your hotel room. If you circled "Yes" for question 9, your card will be charged $____ in addition to these charges. If you do not have a credit card, we will make other arrangements.
13. My airfare can be paid for by: ❑ Me ❑ My organization ❑ Neither
14. My other transportation can be paid for by: ❑ Me ❑ My organization ❑ Neither
    (To/from home, airport, train, and/or car pick-up)
15. My meals can be paid for by: ❑ Me ❑ My organization ❑ Neither
    (If you answer 1 or 2, we will bill you or your organization for hotel meals at $____ per day.)
16. I can help defray costs by covering expenses for the following number of parent leaders:

Logistical Information
Shared Leadership Event

Please keep this information for your reference.

Location of Event and Lodging

The event will be held at:
[Name of institution]
[Address]
[Phone]
[Fax]

Transportation from Airport To Hotel

A complimentary hotel shuttle is available from [name of airport] at the baggage claim counter. Once you arrive at the airport, please call the hotel at [phone number] to have the shuttle pick you up (especially during off-peak hours).

Driving Directions

[Directions]

Meeting Times and Rooms

Check the hotel front desk or the bulletin board in the lobby or just follow our signs for the location of our event. When you arrive at the meeting room, please stop at our conference registration table to pick up your materials and name tag.

Reimbursements

If we have agreed to reimburse you for any expenses related to the symposium, please keep all original receipts and submit them with the enclosed form directly to our office after the event. Additional forms will be available on-site.

Questions?

If you have any questions or concerns, please contact [names] at [phone number].

Step 4: Plan the Logistics

The activities in this step are the responsibility of the Logistics Committee.

The work of the Logistics Committee requires great attention to detail and willingness to work closely with other committees. It also requires a lot of time--from the early planning phase right up to the event itself. Make sure there are enough people on the committee to handle the work, and that they have easy access to the equipment needed to do the work, including:

- A computer with database and basic financial spreadsheet software
- Telephone
- Fax

Definition: *Logistics*

All of the practical details of making the event happen (such as food, lodging, meeting space, and transportation and childcare needs, etc.)

For more concrete recommendations for planning logistics in ways that promote parent engagement, see *Putting Parent Engagement Into Action: A Practical Guide* (Family Support America).

A. Choose a Date

Consulting the Planning Timeline on page 2 to consider how long you need to plan a successful event. Be aware of other deadlines related to the work you plan to get done at the Shared Leadership Event: a grant proposal deadline, a legislative session, the beginning of the school year, etc.

It is a good idea to avoid planning your event during:

- Other events that target the same people
- National holidays
- Government holidays
- Religious holidays observed by people you want to invite
- August, late December, and early January (due to vacations)
- Times when weather makes travel difficult or uncomfortable

Assign one person to research conflicts with other events and to check the calendars of organizations and agencies from which you are recruiting participants for conflicts. Whenever possible, schedule the event around the calendars of invitees with busy schedules, such as policymakers.

Tip: Pick days of the week and times that match the schedules and lifestyles of all participants. Some times are easier for parents, some for staff. Sharing leadership means keeping a practical focus on the scheduling needs of everyone invited.

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Many factors may limit your planning time and put you under a little pressure. A little pressure is okay, but be sure that you can do a good job of organizing the event in the time allowed. If not, a Shared Leadership Event may not be appropriate. If you have less time than you would like to organize the logistics, try one or more of the following:

- Reduce the number of people to be invited
- Reduce the planned length of the event

B. Determine the Event Length

Discuss and negotiate the length of the event with the Agenda Committee. Together, discuss the following questions:

- How much time will people take out of their busy schedules for this topic?
- How long of an event can we afford to pay for?
- How much time is needed to move through the necessary agenda items?

At a local event, it can be hard to keep participants' attention from day to day, as participants may be adding the event to their regular responsibilities. Those travelling from out of town may be more available around the clock, as they may leave some of those responsibilities back home.

It is not recommended that a Shared Leadership Event last longer than three days. Two days is often a good length.

C. Select a Location

The location decision depends on whether the event will take place in your home city or another place, whether it will last a single day or multiple days, and what resources you and event participants have available. Some possibilities are:

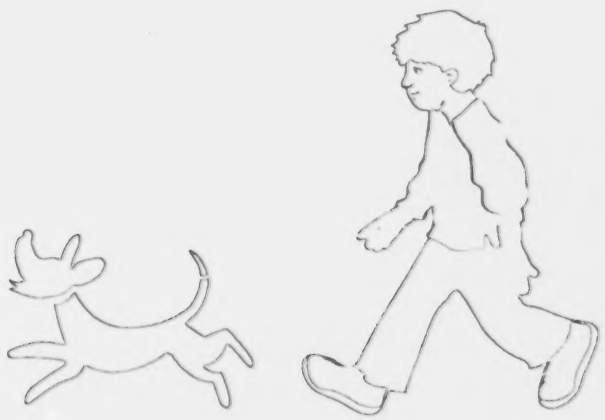
- Colleges and universities
- Hotels
- Public libraries
- Organizations' offices
- Youth clubs and gyms with meeting space
- Churches, synagogues, and other religious institutions
- Schools
- Parks district buildings

Cost is a key factor in choosing. Travel, hotels, and restaurant meals are expensive, and many people cannot afford them. When weighing location options, think about:

- If you require participants to travel to another city, can you raise enough money to pay for their travel, meals, lodging, childcare, and other needs?
- If not, you will only have the participants who can pay their own way. How does this impact the event and its output?

When evaluating a location, ask:

- Will it be convenient for the participants? A national or statewide meeting should be centrally located and/or in a city with access to low-cost, direct flights or near a major highway.
- How it fit with the values and the purpose of the event? It might be important to hold the event in the neighborhood you are discussing, or in a city with successful examples of what you are discussing.
- Is it comfortable, accessible to people with disabilities, and easy to move around in?
- Are there support systems, such as audio-visual technicians, set-up and clean-up teams, etc., or will you need to provide those?
- Is there a suitable space for on-site childcare? Your attendance may be far better if parents can bring their children and know they are cared from early in the morning until late into the evening.
- Does the location have any special appeal? Picking a place people want to go, especially if their expenses are paid, boosts participation. In such a place, planning near a weekend can encourage participants to save the sight-seeing until the event is over.



Designate a person to be responsible for all location-related needs—to be the "point-person" for communicating with outside facilities (for example, the person who talks to hotel or church staff to coordinate the use of space) and to coordinate troubleshoot problems during the event itself. If you have a full-time staff person or parent leader dedicated to coordinating this event, he or she may be able to handle a lot of the tasks alone, or with back-up, once the group has made its decisions. At the event itself, a single person probably cannot handle all of the necessary tasks: designate members of the logistics group to share responsibility.

Do you want to have audio or video recordings of the speakers or any other parts of the event? If so, start planning now. To get useable recordings, you will have to have the service provided professionally by an audio-visual company or the in-house AV services of the hotel, college, or university where the event will take place. Recording usually takes at least a month to arrange. A cheaper alternative is to have a Planning Team member or community member take photographs using a regular camera with a flash—but for sound recordings, professional equipment and services are needed.

(Use Tool 7) In the days before the Shared Leadership Event, prepare the location for the event to take place using Tool 7.

D. Decide on Stipends and Childcare Solutions

Shared leadership requires paying attention to how parents will manage their lives and families in order to be able to attend the event. If they are working parents, the event is not part of their jobs. Those attending as professionals are being paid for their time, but parent leaders typically are not. Take a close look at the message this communicates: Is the time of a parent leader not valued as much as that of a professional staff member? Ideally, non-professional attendees would be reimbursed for all costs and lost work time to come to the event. If this is not possible, work to provide funding for as much compensation as is possible, in the form of parent stipends and scholarships.

Many parent participants, regardless of their role in the event, will have to find childcare overnight and/or during the event. Having children present and providing childcare on-site may be the most supportive and fitting approach, particularly if the event is local. Having children nearby and having them join the group for a few activities often helps to keep participants enthusiastic and focused on the well-being of children and families.

If you do offer on-site childcare, hire only respected and trusted childcare providers.

If you do not offer on-site childcare, you can offer childcare subsidies to pay for parents' own childcare arrangements. If the event is held out of town, consider offering this subsidy to organization's staff as well.

Preparing the Location

1. Prepare an on-site registration area where participants:
- ➜ Pick up name tags
- ➜ Return any paperwork that they did not return in advance
- ➜ Pick up replacements if they forgot to bring materials mailed to them

2. In an easy-to-see place, post an information sheet on Work Groups that:
- ➜ Gives each Work Group an identifying number, letter, or other distinct name
- ➜ States who is in the group
- ➜ States where the group will meet during the Critical Questions Discussions

3. Have a Parents' Hospitality Suite or Parents' Welcome Desk staffed by parent leaders.

Step 4: Plan the Logistics **Neighborhood**

Where? A co-sponsoring church shared its fellowship hall, kitchen, and classrooms. It was central to the neighborhood and had recently added handicap access ramps at every entrance to bring the building up to ADA standards.

When and how long? Hope held a two-day event beginning Friday morning and ending Saturday evening. The Planning Team had checked with the few Jewish staff people to be sure the Sabbath was not a problem. Because the church was not air-conditioned, they chose a date in May (but not Memorial Day weekend!) before the weather changed.

Details: The church asked its womenís auxiliary to cook a dinner for Friday evening; Hope Neighborhood Association provided continental breakfast and box lunches for the other meals. They considered using a van and hiring babysitters at the church, but after discussing this with parent leaders, decided to offer transportation and childcare reimbursement instead.

Step 4: Plan the Logistics **Local Program**

Where? The local school, at which the planned early childhood program would be held, offered to open its facility for a day during spring vacation. This represented a significant sacrifice for the teachers, which participants greatly appreciated. Plenary meetings were held in the cafeteria and Work Groups met in classrooms.

When and how long? The Family Center held a one-day session, from after work on Thursday through Friday. It was difficult for many parents to miss work, but the Planning Team decided, after asking possible participants, that this was preferable to the weekend. They chose a Friday, because it seemed less busy for people at work.

Details: Two classrooms were set up for childcare, and the library was also made available. A teacher at the local high school agreed to recruit several students to provide childcare at its childcare center and paid adults to supervise the care. A welcome dinner, including the children, was held Thursday evening.

Step 4: Plan the Logistics **National Organization**

Where? This national organization chose a city with wonderful family support programs where tours could be offered. It was the home of one of the important organizational partners. With strong foundation support, contributions from the partnering organizations, and many "self-pays" supported by partnering organizations, We the People was able to hold the event in a warm place that was attractive to everyone during the winter!

When and how long? We the People found a week in February when holidays were not a conflict. Three days were assigned to the event—Sunday at noon through Tuesday. The event ended Tuesday mid-afternoon to allow people plenty of time to get home.

Details: All meals and accommodations were paid for by We the People or organizations sponsoring staff and parent leaders. Stipends were offered to other parents, who were trusted to pay what they could. Foundation funds were raised as "scholarships" and transportation and childcare reimbursement was offered.

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E. Create a Budget

To create a budget for your event, the Logistics Committee will have to work closely with the other Planning Team committees. Budgets vary widely from one Shared Leadership Event to another, but you can use the sample budget on page 34 and the budget worksheet in Appendix 1 to build your own.

The kinds of expenses you may need to include in your budget are:

- Meals
- Hotel lodging
- Rent for meeting space
- Transportation
- Stipends for parent leaders
- Childcare subsidies or services
- Honoraria (payment) for speakers
- Materials for outreach (printing, postage, etc.)
- Entertainment

Creating the budget can be like shooting at a moving target! You will need regular cooperative discussions with other Planning Team members who are developing the agenda, building the list of invitees, and raising funds. Budgets are a common source of tension among planners. Here are some trouble-shooting tips:

- Never say, "It's not my problem." Shared leadership means shared responsibility. Any money you spend is money that has to be raised—even if someone else is doing the fundraising.
- Propose a compromise. The compromise may not be everyone's ideal, but it has to be something everyone can agree to. Look together at the goal you set for the event in Step 2. How can a compromise make it happen?
- Promote parent leadership. Planners involved as non-professionals can write grant proposals, talk to foundations or local businesses, and give a reality check on what's expected of the event versus the money available.

Sample Budget: National Organization

I. OFFICE EXPENSES				
Binders w/tabs			$ 1,150.00	
Velobinding			$ 1,050.00	
Office supplies (markers, etc.)			$ 450.00	
			Total	**$ 2,650.00**
II. CONTRACTUAL SERVICES				
Facilitation			$ 3,000.00	
			Total	**$ 3,000.00**
III. PRINTING/PUBLICATIONS				
Mailing Binders (postage)			$ 1,100.00	
UPS Costs			$ 600.00	
Kinko Copying			$ 1,100.00	
			Total	**$ 2,800.00**
IV. TRAVEL EXPENSES	per person	no. of people		
Ground Transportation				
Roundtrip Home to Airport	$ 30.00	120	$ 3,600.00	
Roundtrip Airport to Hotel	comp			
Airfare	$ 400.00	120	$ 48,000.00	
			Total	**$ 51,600.00**
V. MEETING EXPENSES				
Sleeping Rooms	per person	no. of people		
1-Dec	$ 85.00	25	$ 2,125.00	
2-Dec	$ 85.00	35	$ 2,975.00	
3-Dec	$ 85.00	89	$ 7,565.00	
4-Dec	$ 85.00	89	$ 7,565.00	
5-Dec	$ 85.00	15	$ 1,275.00	
		Subtotal	$ 21,505.00	
		Occupancy Tax 10%	$ 2,150.00	
		Hotel Gratuities 5%	$ 1,075.00	
			Total	**$ 24,731.00**
Meeting Room Rental	comp			
Catering	per person	no. of people		
12/2: Breakfast Cont.- Delux	$ 8.95	50	$ 447.50	
12/2: Lunch Italian	$ 18.95	50	$ 947.50	
12/2: A. Break Cookies	$ 6.95	50	$ 347.50	
12/2: Dinner Buffet	$ 24.95	50	$ 1,247.50	
12/3: Breakfast Cont.- Delux	$ 8.95	50	$ 447.50	
12/3: Lunch BBQ	$ 16.95	120	$ 2,034.00	
12/3: A. Break Cookies	$ 6.95	120	$ 834.00	
12/3: Dinner Buffet	$ 24.95	120	$ 2,994.00	
12/4: Breakfast Cont.- Delux	$ 8.95	120	$ 1,074.00	
12/4: Lunch Homestyle	$ 14.95	120	$ 1,794.00	
12/4: A. Break Cookies	$ 6.95	120	$ 834.00	
12/4: Dinner Buffet	$ 24.95	120	$ 2,994.00	
12/5: Breakfast Cont.- Delux	$ 8.95	120	$ 1,074.00	

12/5: Lunch	Deli	$ 15.95	120	$ 1,914.00	
			Subtotal	$ 18,984.00	
			Service Charge(20%)	$ 3,796.00	
			Sales Tax: 6 %	$ 1,139.01	
				Total	$ 23,919.00
Friday Night Meal		$ 25.00	30		
				Total	$ 750.00
Audio/Visual Needs					
2-Dec		per mtg.	no. of mtgs.		
General Session	Flipchart	$ 40.00	1	$ 40.00	
	Overhead	$ 85.00	1	$ 85.00	
Breakouts	Flipchart	$ 40.00	3	$ 120.00	
3-Dec					
General Session	Flipchart	$ 40.00	1	$ 40.00	
	Overhead	$ 85.00	1	$ 85.00	
	LCD Projector	$ 600.00	1	$ 600.00	
	9x12 Screen	$ 125.00	1	$ 125.00	
	Mic	$ 30.00	1	$ 30.00	
Drafting Sessions	Flipchart	$ 40.00	3	$ 120.00	
4-Dec					
General Session	Flipchart	$ 40.00	1	$ 40.00	
	Overhead	$ 85.00	1	$ 85.00	
	LCD Projector	$ 600.00	1	$ 600.00	
	9x12 Screen	$ 125.00	1	$ 125.00	
	Mic	$ 30.00	1	$ 30.00	
Drafting Sessions	Flipchart	$ 40.00	4	$ 160.00	
5-Dec					
General Session	Flipchart	$ 40.00	1	$ 40.00	
	Overhead	$ 85.00	1	$ 85.00	
	LCD Projector	$ 600.00	1	$ 600.00	
	9x12 Screen	$ 125.00	1	$ 125.00	
	Mic	$ 30.00	1	$ 30.00	
Drafting Sessions	Flipchart	$ 40.00	4	$ 160.00	
			Subtotal	$ 3325.00	
			Service Charge(20%)	$ 665.00	
			Sales Tax: 6%	$ 199.50	
				Total	$ 53,589.00
VI. OTHER EXPENSES				$ 4,190.00	
Parent Stipends				$ 2,200.00	
Childcare				$ 900.00	
Decorations				$ 1,500.00	
Miscellaneous				$ 1,100.00	
				Total	$ 5,700.00
GRAND TOTAL					**$119,339.00**
Note: Parents with children, special guests, and those paying extra have private sleeping rooms (qty: 20).					
All other attendee sleeping rooms are calculated per double occupancy.					

F. Raise Funds

Below are some methods for obtaining the money needed to hold a Shared Leadership Event. There are may other possibilities—think about strategies that have worked in the past, and ask your friends and colleagues, and brainstorm together as a group. More fundraising information can be found in *Family Support Centers: A Program Manager's Toolkit* (Family Support America).

1. Partnerships

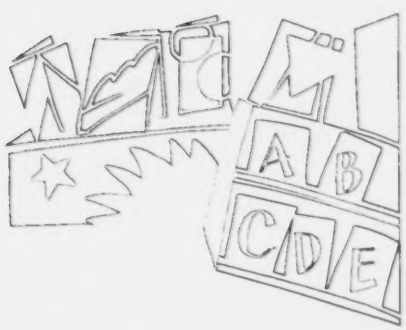
Are there other organizations that need the product and outcomes you identified in Step 2? Are there others who share your goal and your commitment to sharing leadership with families? By joining forces, you may be able to create a better event. Partnering adds to the planning, but it can help you reach a much wider, more diverse group. It may help you find new sources for funding and allow you to pool dollars. Partnering may create a whole range of additional uses for the Consensus Document.

Here are some tips for partnering with other organizations:

- You may need to fine-tune your goal, products, outcome, and event description to satisfy all partner organizations. But don't change them completely—if that's a requirement, you haven't found the right partners.
- Give clear responsibility for different pieces of the work to different organizations. Do it in writing to avoid misunderstandings.
- Ask who will represent each partner on the Planning Team. Get their approval before big decisions are finalized.

2. Planning Grants

If the product of your Shared Leadership Event will be a plan for a project that a foundation or a government agency (a grantor) is interested, that grantor may be your best source for funding the event. Many large grantors who are interested in funding a project



52

require a planning process and will not approve start-up funding until the plan is produced. They will pay for the planning—which could include or consist of the Shared Leadership Event. In these cases, the Shared Leadership Event is an integral part of a responsible planning process.

3. Capacity-Building Grants

Your Shared Leadership Event may be able to receive funding from a foundation or government agency that wants the partners planning the event to build their shared leadership capacity or their involvement of parents in decision making. For example, an organization currently funded by a grantor may receive support from that grantor to use the Shared Leadership Event as a way of increasing its capacity in strategic planning, parent leadership, parent involvement in decision making, cultural competence, training, and other areas.

The Shared Leadership Event is a concrete step in shifting management, governance, and planning functions toward a democratic model that values parents' voices. Organizations that have committed to making that shift can apply for capacity-building grants from like-minded grantors to bring their actions in line with their philosophy.

4. Sponsorships

If your event is going to be public—or if the outcome and products are expected to draw a lot of public interest—a corporation might want to sponsor your event. Whether to show that they are family-friendly, to get their name out in a potential market, or to use the funds of a corporate foundation for family-supportive purposes, corporations have many reasons to give you their money or their products in exchange for putting their name and logo on the event.

Here are some tips for engaging in corporate sponsorship:

- Corporate support is not "free"—it can take considerable time from one or more Planning Team members, and time is money.
- Appoint a single person to be in contact with the corporation. That person can contact others on the planning team as needed.
- Public exposure is their main concern—and it has to be positive. Make sure their logo appears just where they want it on your materials, and that all coverage includes them.
- Public thank you's are very important! The corporation must come away thinking their investment paid off in positive publicity.

Step 5: Plan the Event Agenda

The activities in this step are the responsibility of the Agenda Committee.

The name of Step 5 is a little misleading—the work in this step goes beyond creating a written agenda to include inviting speakers, writing the discussion questions that form the core of the event, and preparing Planning Team members to staff the event.

What will the participants do at the Shared Leadership Event? What will you talk about? How will the talking translate into consensus, and the consensus into action? The work of Step 5 answers those questions. This step includes powerful decisions, so the Agenda Committee must include of all of the voices involved in the Shared Leadership Event.

A. Get to Know the Process

The Shared Leadership Event is based on a carefully thought out and tested process for running the event. In brief, the event works in the following way:

Participants meet as Work Groups to discuss Critical Questions. They bring their answers or output to the Full Group. The Full Group combines that output to create Agreements. A Drafting Group uses those Agreements to create a Consensus Document. Parts of the process can be repeated as necessary.

Below is a basic outline of a Shared Leadership event. All activities involve the Full Group meeting together, except those parts noted as "Working Group" or "Drafting Group" sessions.

Basic Parts of a Shared Leadership Event

A. Introductions and Overview
B. Panel / Speaker(s) ..... Optional
C. Critical Questions Instructions
D. Critical Questions Discussion ..... Working Groups } Repeat D-E as needed
E. Reporting and Consensus Session } to cover all Critical Questions
F. Drafting Session ..... Drafting Group } Repeat F-G as needed for
G. Review Consensus Document } consensus, as time allows
H. Closing Celebration

This basic outline can be spread out over one, two, or three days and modified to match the complexity of your goal. In a one-day event, you might want to have few or no speakers and use lunchtime for your Critical Questions Discussions. For a two- or three-day event, you will need to schedule multiple meals, breaks, and fun activities. Activities such

as panels, speakers, meals, entertainment, and special events can be added at different times. In a large event, the Reporting and Consensus Session may be skipped.

For examples of agendas that are modified for different types of groups and lengths of events, see Appendix 2.

The Shared Leadership Event process is described in detail in Part 2. You should read Part 2 carefully now.

B. Write the Agenda

Sample agendas showing the process in the context of a neighborhood, a local program, and a state or national organization are in Appendix 2, and a basic outline is provided above. You will need to adapt the agenda to meet your goal and generate the products and outcomes that you decided on in Step 2.

Here are some overall guidelines for developing the agenda:

- **Stay close to your goals.** Refer regularly to your event description. Without this focus, you might have a great discussion and build great relationships but not be able to produce a Consensus Document that leads to action. People's energy will stay high when they feel they are accomplishing the goals. Do you need to adjust your goals? Now is the time to do it!
- **Choose the right format for the right task.** As Part 2 shows, there are four types of sessions during the event. Match each task that you want to accomplish with the best format for that task.
- **Break it up.** Make sure participants have time to speak, listen, and breathe! Plan breaks and fun activities, especially during a multi-day event, to make sure participants don't get exhausted and lose effectiveness. Even if they seem to use up valuable time, these breaks will raise productivity.

C. Write Critical Questions

(See Part 2 to get a complete understanding of how the Critical Questions will be used during the Shared Leadership Event.)

Critical Questions are used to start the discussions during your event, but they need to be written ahead of time. In general, it is good to have three to five questions per session. These questions must be specific enough to result in the goal, output, and products you described in Step 2.

The more strongly the Planning Team agrees on the Critical Questions, the more representative the final product will be. Before drafting the questions, seek input from Planning Team members and others you plan to invite to the event. To ensure maximum input:

- Hold brainstorming meetings
- Ask people to send you suggested questions
- Contact people individually and interview them about their greatest concerns or questions
- Include any questions you must answer, from a proposal you are writing or a set of questions others have asked you to answer

The way you word the questions affects the final Consensus Document and, therefore, the future of your work after the event is over. Refer often to your event description while drafting them, and consider:

- What do you want people to hear from each other?
- What decisions and choices need to be made?
- Where will you go from here?
- What kinds of answers will allow you to produce a Consensus Document that lends itself to the product you described in Step 2?

The questions will set the pace for Work Group conversations—so choose carefully how many questions a single session can handle. Group questions by similar topics and try to focus each Work Group session on one set of questions. Once the Critical Questions are drafted, let many people review them—their feedback will be important to you.

The following "We Did It!" stories offer sample Critical Questions.

WE DID IT!

Step 5: Plan the Agenda/Write Critical Questions **Neighborhood**

Here are the Critical Questions that the Agenda Committee created for Hope Neighborhood Association's Shared Leadership Event:

Session 1

- What are the best things happening for families in this neighborhood right now?
- If we were to increase and improve the best of what is happening, what would we see as the results?
- In other words—how would the lives of people in this community change?

Session 2

- What are the most important obstacles to families' success and the well-being of their children?
- What would have to change if we are to remove those obstacles?
- In what order should we make these changes?

Session 3

- Thinking about the changes we discussed earlier, what are the best ways we could start changing things immediately (kinds of activities, programs, things to do)?
- Who should be involved in this work?
- How will we start?

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Step 5: Plan the Agenda/Write Critical Questions **Local Program**

Here are the Critical Questions that the Agenda Committee created for The Family Center's Shared Leadership Event:

Session 1

- Who should this program be for?
- What are their most important needs?
- What are their families' needs?
- What strengths do those families bring to the program and to the school?
- Exactly what do the parents, the child development specialists and the school want to accomplish?

Session 2

- Given all the goals and needs discussed before, what would be the ideal program activities?
- What activities and services should there be for parents?
- What other resources are there in the neighborhood that can help us? (In the City? State?)
- Who should be running and working in the program?
- How should the program connect to the school?
- How should we start?

Step 5: Plan the Agenda/Write Critical Questions **National Organization**

Here are the Critical Questions that the Agenda Committee created for the We the People Shared Leadership Event:

Session 1

- How do the principles of family support actually show up in public policy today?
- How can family support principles be better reflected in public policy that concerns families and children?
- What do the principles call for in paying for and integrating services?
- What are the operational elements of family support that should be translated and integrated into public policy?
- How could the policy-making process change to correspond to the principles of family support practice?

Session 2

- What high quality family support models and practices are happening now that we can learn from?
- What are the key areas that need reform, especially in:
  1. Services for families and children and how they are delivered
  2. Financing of (funding for) services for families and children
  3. Embedding family support principles into systems affecting families and children

Session 3

- Reviewing all prior discussion and specific policy recommendations, what are our priorities for the report?
- What central messages and proposals do we want to communicate?
- Who can best execute these recommendations?
- How can the organizations and individuals represented here assist in this?
- How can this report be used most effectively to achieve maximum impact in the months and years to come?
- How do we start?

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D. Assign Roles for Staffing the Event

1. Choose a Moderator

The Moderator for the Shared Leadership Event leads the large sessions, explains the process, introduces speakers, gives Work Groups their assignments, and keeps the event running smoothly. The Moderator should be calm, well respected by participants, and involved during the entire planning phase. Because of this, it's a good idea to choose a back-up Moderator who is also involved during the planning phase and could fill in at the event if needed. The Moderator will also lead the Full Group sessions and should be able to remain neutral and include all those who wish to speak.

2. Assign Work Group Roles

Using the a list of participants generated from the invitee/participant database, divide participants into Work Groups of 12 to 20 people each. Use your Matrix of Voices to be sure you represent all different voices in each group.

Facilitators

Choose two people in each Work Group to facilitate discussions—preferably, a parent leader paired with a professional program provider, policymaker, or advocate. The Facilitators make sure that:

- Everyone in the group is heard
- Everyone feels that they are a part of the conversation
- The questions are fully answered
- The consensus of the group is well understood

You will need to choose Facilitators based on who is best for the job and who is available. Select people who:

- Are comfortable with a wide range of opinions and backgrounds
- Are good listeners and will not dominate the session
- Can contribute good ideas themselves
- Are looked up to by other participants but are still considered peers
- Can understand and balance both the product and the other outcomes desired
- Can keep people on task while nurturing the relationships and making sure people feel heard

(Use Tool 8) Here are some tips for inviting people to be Facilitators and working with them once they agree to do so:

- One person should communicate with potential Facilitators
- When asking someone to facilitate, provide a written description of what he or she is expected to do
- Allow him or her to say no
- Offer at least one training—preferably in person, or by conference call if necessary (see Tool 8)

58

- ⇨ Check in with Facilitators one more time before the event to go over the agenda and his or her responsibilities
- ⇨ Schedule Facilitator check-in time during the event so they can share lunch or a late-night cup of tea and discuss how Work Groups are doing
- ⇨ Plan ahead to thank the Facilitators both at the event and during follow-up

Recorders

Each Work Group will need a Recorder for each session (although a Recorder can report on more than one session in a row). Recorders listen and write down their groups' answers to the Critical Questions. When all participants reconvene following the Critical Questions Discussion, the Recorders give those answers to the Moderator. Although the Recorders write down the answers, all Work Group members share responsibility for making sure the written answers are clear and accurate.

If you can borrow or rent a laptop computer for each Recorder, their work and the work of the Drafting Group will be much easier. In this case, be sure there is a person on-site who knows computers and is ready to help with any technical problems. Give Recorders a chance to become familiar with the computer before the first Work Group session.

Provide each Recorder and Facilitator with the Critical Questions on a disk (if you have laptop computers—so he or she can type in the answers) or on a written form with space to fill in the answers by hand. This step makes it much more efficient for the Drafting Group to combine the results from all of the Work Groups into a single document.

(Use Tool 9) Tool 9 offers tips for Recorders. You should provide it to the Recorders before and at the beginning of the event.

Tips for Facilitators

Facilitator's Role: Guide the Work Group toward consensus, or agreement.

➜ Be prepared. Before the event starts, please:

- Read and think about the Critical Questions that your group will be answering
- Read the Event Description provided by the Planning Team and be familiar with the goal, products, and outcomes of the event
- Decide with your co-Facilitator how the two of you will share the duties described below—by dividing them or by taking turns

➜ Determine how much time you have for each question, and announce that to the group in advance.

➜ One Facilitator should guide the discussion and the other should keep time and make sure the group has agreed on a complete answer. Be sure that the question is answered completely, but move on when people begin to repeat things that have been said.

➜ Help the group discover its consensus, the things they agree on or can come to agreement about. Do this by keeping conversation focused, making sure people are really listening and that differences are discussed and resolved.

➜ Also make sure the discussion fosters relationship-building and sharing. If time permits, allow the group to go off the topic when the new discussions seem useful (with the Recorder recording the outcome of these discussions).

➜ Create a balance: Make sure the discussion is both directed and open, both focused and flexible. The members of the group should be free to take the conversation where they feel it needs to go, and you should guide the group toward answering the questions.

- When it doubt, ask the group if they feel they are being productive. This is a sign of respect and leads to an honest discussion.

- It is best not to simply call on people in turn, but to make sure each important idea is completely discussed. When consensus is reached on that idea, move on to a new point. Be sure you let your group know that is what you are doing.

- Help the quieter folks to be heard, and do not let anyone (including the Facilitators) dominate the conversation. Watch faces—you'll be surprised how well you can tell who has something to say, when someone is talking too much, and when you have reached agreement and can move on.

- Express your own views but no more than anyone else—do not use your position to steer the conversation toward your viewpoint. As co-Facilitators, help each other guide, not drive the group. Let the group know when you are speaking as participant and not as Facilitator. If you feel really strongly about a certain point, turn the facilitation over to your co-Facilitator.

- If you have a series of Work Group discussions, when you reconvene, do not summarize the previous discussion. Move ahead.

- Encourage compromise. Ask participants to block agreement only if it is very important to them that the answer being discussed not appear in the Consensus Document. If you cannot reach consensus, ask the Recorder to record the majority and minority viewpoints and move on. The notes should reflect the points of agreement and any important reasons for dissent.

Tips for Recorders

Role: Capture the Work Group's answers to the Critical Questions.

- ➔ Enter the answers on the disk or write them onto the form provided by the Planning Team member who has been working with you.
- ➔ Your recorded answers should reflect the key decisions and comments of the group clearly and accurately.
- ➔ You do not have to write down what everyone said word-for-word. Listen carefully and take down the ideas and statements that the group accepts and agrees to.
- ➔ Avoid quoting anyone by name, but if someone says something that the group feels expresses the idea very well, write the whole quote down so the Drafting Group can use it in the Consensus Document.
- ➔ Concentrate more on general ideas than on precise wording. Words will be changed in the drafting of the final document.
- ➔ Record all minority views that are strongly held by a significant number of participants.
- ➔ It's not your job to draft the Consensus Document. Instead, cover the key points of agreement and note the major points of disagreement.
- ➔ Take a few minutes after the Work Group session to finalize the answers.
- ➔ Bring the answers to the Moderator at the start of the next full session.

3. Choose Drafting Group Members

This group produces the Consensus Document. Whether in written form or on computer disk, the group will receive the results of each Work Group's discussions. It will use those answers to create a Consensus Document for the entire group.

The Drafting Group should be made up of two representatives from each Work Group. You may designate Work Group Facilitators and/or Recorders to be part of the drafting team, as part of their job descriptions. Or you may call for volunteers when you send your invitations. Alternatively, you may decide to wait until the event to choose Drafting Group members. If you take this approach, assign one Logistics Committee member to go around to each Work Group at the event, once discussions are underway, and ask them to choose a pair of Drafting Group representatives. You can decide ahead of time that the pair should be a professional and a parent leader, but you may also choose to let this happen by chance.

The Drafting Group meets while other participants are on a break or have gone home. Make sure that those who are going to be in the group are willing to give up their free time and are fully prepared to attend all sessions. Consistent membership of this group is important to the quality of the final product.

E. Invite Speakers

Inviting speakers to address the group can be a good way to inspire and educate participants. Their information can be useful for the Work Groups, and their words of encouragement can raise the energy level. But don't spend too much time on speakers or you will not have time for all voices to be heard during the discussions. For a one-day event, you might invite two speakers—one to share information and another to excite the crowd—for just 15 minutes each. You may also want to invite someone to close the event with a short, inspirational speech. At a longer event, the time before the Full Group sessions or during lunch can be used for panels to share information and points of view.

When deciding on which speakers to invite, consider:

- The diversity of speaker backgrounds
- The diversity of speaker points of view
- What kind of information you want to share with participants

Try to connect speech topics to the Critical Questions addressed during Work Group session. Having the information just recently presented can help make the discussions more lively and focused.

Assign one person to be the lead contact with speakers. This person should:

- ⇨ Make sure the speakers understand the event
- ⇨ Explain what the Planning Team wants them to talk about
- ⇨ Tell the speakers how long they have to speak

Look at the sample agendas in Appendix 2 to get more ideas for how speakers can help your event move along and achieve its goals.

E. Distribute Materials to Participants

Participants must have background information in order to be productive, but most will not spend a lot of time reading before they come to the Shared Leadership Event. Identify a person from the Agenda Committee to select and collect the documents you want participants to review and distribute them to all registered participants. A reasonable mailing would include:

1. The event description
2. A list of the Critical Questions you plan to give the Work Groups, if these are ready in time
3. One or two brief documents describing good examples of the kinds of programs, policies, or planning products you are planning to discuss
4. Any rules as to what your Consensus Document can include for it to be a useful product (if you are creating a grant proposal, proposal guidelines; if you are planning a program, rules that the program must follow to be funded)
5. A list of:
   - Names of invited participants
   - Names and contact information for Planning Team members
   - Names of sponsors and donors

F. Meet to Overcome Challenges

(Use Tool 10) No matter how hard you work or how experienced your Planning Team is, you will hit obstacles along the way. But if the event is important to you, you can meet and overcome these challenges. Whether your problem is one of money, finding connections to the policymakers, reaching out to parents, or finding a suitable location—you can always find a creative solution. Take a look at the following "We Did It!" stories, and use Tool 10 to come up with the strategies when you get stuck.

Overcoming Obstacles **Neighborhood**

Obstacle

No city council members or other policymakers were part of Hope Neighborhood Association's efforts. The low-income community in which the neighborhood was located had not received much attention from public officials. Without the participation of these power brokers, Planning Team members worried, the community could not achieve transformation. How could they get these officials to come to the event?

Creative Solutions

Hope staff and volunteers decided to work both publicly and behind the scenes. They met with local pastors who had connections in the mayor's office and asked them to arrange meetings for them. They called their local council members and asked for meetings. They asked the funder with whom they were working to place a supportive phone call as well.

One of the parents remembered a helpful housing official who had responded to a problem, and another, after asking around the neighborhood, heard of an official who had gotten some troubling trash removed. They met with these officials and asked them to arrange meetings for them with the heads of the public works and housing departments. The Planning Team members used every person they could think of to make connections.

Meanwhile, they held voter registration drives at the church and asked a reporter from the local newspaper to cover the planning of the event as well as the event itself—creating greater public awareness of their small neighborhood. When the event day came, the housing commissioner sent her deputy and the public works commissioner sent the director of sanitation. The mayor's office sent a representative, and the mayor agreed to give a keynote speech. And all three council members showed up for at least part of the event.

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Overcoming Obstacles **Local Program**

Obstacle

The Family Center's goal for its Shared Leadership Event was to create a plan for a pre-school, school readiness program. The center had never run such a program, although it had successfully worked with children aged birth to three on-site for many years. Everyone agreed that the event would be a good way to ensure parent and staff input, but some worried that without experts on school readiness attending, the plan would not include appropriate content, and the program would not be funded. Some wanted to cancel the event altogether.

Creative Solutions

Parents and staff took many actions to get school-readiness experts involved in their event. The center had good relationships with the school and the school system because it ran a successful after-school program. Parents of children at the school asked the principal to call the school system's school-readiness administrator and ask for the names of several local experts on early childhood programming and for the names of any respected curricula. They discovered that the author of two of those curricula lived within 50 miles of their neighborhood. They invited her to come to the event and give a speech on the ingredients of an excellent early childhood program. (Naturally, she hoped they would use her curriculum in their program—but the Planning Team made no promises!)

Staff contacted the local colleges and set up meetings with the heads of the Early Childhood Education departments to discuss the need for the program and gather these experts' thoughts. Several professors and five of their graduate students were interested in the project and attended the event, where their ideas were included in the plan.

In addition, several parents and staff studied the programs they had learned about and became quite experts themselves. They realized that it doesn't take a title to have important knowledge and expertise.

Overcoming Obstacles **National Organization**

Obstacle

Although We the People had no problem contacting policymakers and getting funding, they had a poor track record of reaching out to parents. This event would be their first attempt to engage parents in participating in decision making and policy development. The organization's board and many of its staff worried that it wouldn't work.

Creative Solutions

The director of the organization and several staff were committed to changing its practice. They contacted a number of local partners with whom they had worked for years and talked with them about the idea of a Shared Leadership Event. They invited them to participate—but in a new way. They asked each program and local or state advocacy organization to commit to finding and bringing at least as many parents as staff. They asked each legislator to recommend active constituents. They asked state agencies to name parents who had served on their advisory boards. This was easy for some of the programs and more challenging for others. But the result was not only an event with half parent and community leaders; they also heard that they had pushed their friends in local and state organizations to make closer contact with their parent leaders, perhaps changing their way of doing business at the same time.

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Overcoming Obstacles

Following are some possible challenges you might encounter. Below each challenge, brainstorm some solutions by discussing the following questions:

- Whom can we ask for help (or for the names of others who might help)?
- Whom can we ask for information?
- What we can learn from the Internet and/or the library?
- How we can reduce the problem (save money, change the goals a little, change logistics)?

Challenge We can't pay for this!
Solutions (Hint: See "Raise Funds to Meet Your Budget.")

_____

_____

Challenge We don't know enough about this!
Solutions (Hint: Find people who do—get them interested—and learn!)

_____

_____

Challenge We don't even KNOW a powerful person!
Solutions (Hint: Think about all different kinds of "power.")

_____

_____

Challenge We have never worked with parents this way before. Are they are up to the task? How will we find them?
Solutions (Hint: Every parent you work with can be a leader, when given the tools, information, and opportunities. Reach out through partners.)

_____

_____

(Below, fill in your own—be creative and determined!)

Challenge _____
Solutions _____

_____

Challenge _____
Solutions _____

_____

A Shared Leadership Event

Step-by-Step

The Shared Leadership Event is a structured, facilitated dialogue that includes diverse voices to arrive at a set of agreements, summarized in a report called a Consensus Document. †

Part 2 of this book walks you through the Shared Leadership Event step by step.

Basic Parts of a Shared Leadership Event

A. Introductions and Overview
B. Panel / Speaker(s) .....Optional
C. Critical Questions Instructions
D. Critical Questions Discussion .....Working Groups } Repeat D-E as needed
E. Reporting and Consensus Session* } to cover all Critical Questions
F. Drafting Session .....Drafting Group } Repeat F-G as needed for
G. Review Consensus Document } consensus, as time allows
H. Closing Celebration

* In a large event, this step may be skipped (for example, see Appendix 2, Sample Agenda, Version 3).

Activities such as panels, speakers, meals, entertainment, and special events can be added at different points in the agenda (for examples, see all of the Sample Agendas in Appendix 2).

Definition: *Facilitated Meetings*

Meetings are *facilitated* when a person leads the group process, includes all voices, and guides the group towards its decisions. A Facilitator does not try to push his or her own beliefs onto the group.

All activities involve the Full Group together, except where indicated by the words Working Groups (participants split into small groups) and Drafting Group (only this group meets). Use Part 1 of this book (Step 5: Plan the Agenda) to tailor this agenda into one that works best for the goals of your Shared Leadership Event.

† This process is based on the American Assembly model and also draws from the following sources: *Open Space Technology,* 2nd Ed., by Harrison Owen, (Berrett-Koehler, 1997); *Future Search: An Action Guide to Finding Common Ground in Organizations in Communities,* 2nd Ed., by Marvin Weissbord and Sandra Janoff, (Berrett-Koehler, 2000); *The Thin Book of Appreciative Inquiry,* 2nd Ed., by Sue Hammond (Thin Book Pub. Co., 1998); *Lessons from the Field: Applying Appreciative Inquiry,* Rev. Ed., edited by Sue Hammond and Cathy Royal, (Thin Book Pub. Co., 2001).

The following pages provide detail on each part of the Shared Leadership Event. While each part includes "Preparation Needed", it is understood that carrying out Steps 1 through 4 from Part One and reading all of Part Two are required in order to prepare for all parts of the event.

A. Introductions and Overview

Time needed:	.5 to 1.25 hours
Preparation needed:	Step 5/D/1: Choose a Moderator
Who participates:	Full Group
Materials needed:	Public address system
Desired outcome:	Ground participants in event goal and prepare them for the event
Process notes:	The Moderator speaks first: ⇨ Introduce event based on the Event Description ⇨ Thank partners and sponsors ⇨ Introduce presenters (see Sample Agenda)

B. Panel / Speaker(s) (optional)

Time needed:	.5 to 1 hour
Preparation needed:	Step 5/E: Invite speakers
Who participates:	Full Group
Materials needed:	⇨ Public address system ⇨ Equipment to project speakers' audio-visual presentations
Desired outcome:	Convey full range of voices involved in the event
Process notes:	The Moderator introduces speakers. If there is a panel, each panelist gets an equal amount of time to speak on the topic. They can introduce the issues, discuss the goals for the event, and provide information that will help the participants make good decisions and choices. A mix of speakers should be chosen to both inform and inspire.

Tip: Plan in advance if you want speeches recorded. See Part 1, Steps 3 and 4

C. Critical Questions Instructions

Time needed:	5 minutes to .5 hours
Preparation needed:	Step 5/C: Write critical questions
Who participates:	Full Group
Materials needed:	➪ Public address system ➪ Flip chart and markers or projector
Desired outcome:	Participants know what to do in next session
Process notes:	The Moderator provides information on Critical Questions Discussion 1:

➪ Gives instructions on what to do in the session

➪ Reads the Critical Questions that will be discussed (and has these written on flip-chart or projection)

➪ Tells participants:

- What will happen to the output of the session
- When the session will begin and end
- Where to go for the session
- The time and location of the next Full Group activity after the session
- That recorders are to bring the Critical Questions answers to the Moderator at the beginning of the next Full Group activity

Here is a sample of what the Moderator might say:

We will now leave this room to do the most important work of our event. You will meet in your assigned Work Groups (refer to where Work Group assignments are posted) in the rooms assigned (refer to same). Here are the Critical Questions you will be discussing in the following session (point to flip chart or screen and read).

Please work respectfully and help your Facilitators and Recorders to bring us back a clear report. Recorders, bring those reports when we all get back together at (exact time and location)!

D. Critical Questions Discussion

SEE PAGE 39

SEE PAGE 42

Time needed:	1.5 to 2 hours
Preparation needed:	Step 5/C: Write critical questions Step 5/D/2: Assign Work Group roles
Who participates:	Work Groups (all participants, divided into groups of 10-12)
Materials needed:	➪ Critical Questions for this session ➪ Flip chart and markers ➪ Laptop computer (if possible—if not, notebook and pens)
Desired outcome:	Through facilitated discussion, participants come to consensus on answers to Critical Questions
Process notes:	➪ This session is staffed by two co-Facilitators and a Recorder. See Part 1, Step 5, D, for full descriptions of these duties and instructions on carrying them out. ➪ The different Work Groups all discuss the same Critical Question. If the event is to have a series of Critical Questions discussions, the Planning Team will have written a set of questions for each discussion. ➪ Do not go back to Critical Questions discussed previously, but focus on the questions provided for the current discussion. ➪ The discussion should move the group consensus-based answers to the Critical Questions. But it should also foster relationship-building, improve understanding, and mobilize everyone for future action.

E. Reporting and Consensus Session

Time needed: 1.5 hours

Preparation needed: Same as A and D, above

Who participates: Full Group, staffed by Moderator and a member of the Drafting Group who serves as Recorder

Materials needed:
- ➪ Public address system
- ➪ Flip chart and markers or projector

Desired outcome: The Full Group has a general sense of how different Working Groups answered the same Critical Questions and what the Full Group's consensus might be

Process notes:
- ➪ Each Working Group (or one or two members) stands up to report on their answers to the Critical Questions in an informal way. Keep it fun and encourage cheering and applause. This is for discussion, not "for the record."
- ➪ After the groups have all reported, the Moderator takes the Critical Questions one at a time and leads a Full Group discussion on points of agreement and disagreement among the Working Groups. (A member of the Drafting Group serves as Recorder for this discussion.) Participants can try to persuade each other. If one group suggests an answer that others did not, the Moderator should ask if the rest of the Full Group wants to use that idea.
- ➪ The Moderator should guide this discussion fairly informally so different opinions can come out openly. The goal is to build the consensus in response to the questions. Good ideas that do not conflict with one another can be recorded and move on to the Drafting Group.

- Do not become "stuck" at a point of disagreement. Consensus means that you try to find a way to answer the question that includes as many views as possible. Consensus also means that those who disagree are asked to "go with the flow" of the group, unless it is a major point that they simply cannot give in on. Discuss the question for some time, and if someone continues to disagree, the Moderator and Recorder should note his or her opinion respectfully and move on. You may need to return to this point later, or your final product may simply note the viewpoint that differs.
- At the end of this session, Recorders from all of the Working Groups hand their groups' answers (on disk or on the written form provided) to a designated member of the Drafting Group. The Moderator should have this person stand up so everyone knows who he or she is.

What If We Disagree?

At The Family Center Shared Leadership Event, the majority of participants thought that the first year of funding should include a parenting peer support group for the early childhood program. But a number of people believed that a parent job readiness program should be the first priority. The Moderator started a list of programs to seek funding for and to add in Year Two, then moved the discussion on.

F. Drafting Session

Time needed:	1.5 to 3 hours
Preparation needed:	Step 5/D/3: Choose Drafting Group Members
Who participates:	Drafting Group
Materials needed:	➪ Computer, printer, and photocopier (if at all possible—or, if not, flipchart and markers) ➪ Answers to Critical Questions from the Recorder of each Work Group ➪ Notes from the Recorder of the Reporting and Consensus Session
Desired outcome:	➪ Draft of a Consensus Document that represents the consensus of the Full Group regarding the Critical Questions and which serves as the desired output described during Part 1, Step 1
Process notes:	Normally, the Drafting Group is selected before the meeting and is made up of two members of each Work Group and staff of sponsoring organizations. Alternatively you can: (1) have a Facilitator and Recorder from each Work Group be on the Drafting Team, as part of their job descriptions, or (2) during the first Critical Questions Discussion, ask each Work Group to choose spokespeople they feel will represent them well. It often works best if each pair consists of a professional and a parent leader. The process of creating a Consensus Document is different from event to event, but here is a recommended approach: ➪ Start with the first Critical Question, and look at how each Work Group responded to it (and how the Full Group responded to it, if there was a Reporting and Consensus Session). ➪ Discuss the similarities and differences in the responses. ➪ Attempt to make a statement that expresses the shared views of all the participants.

- Do not to begin again to discuss and respond to the question, as you did during the Critical Questions Discussions. Just discuss the shared views expressed by the groups and write a statement that expresses those views.
- Record the results of this discussion on computer.
- Proceed to the next question and do the same.
- Once you have discussed and summarized the shared views of all of the Work Groups and Full Group regarding all of the questions, rework what you have written so that it stands as the product that you set out to create through this Shared Leadership Event. This is the draft of the Consensus Document.
- If you are working on computer, print out the draft product and distribute copies to all participants during the next agenda item. Otherwise, write a clear outline of the document on the flip chart.
- You do not have to stick to the exact order and flow of the questions as they were given to the groups. The Work Groups may have mixed and combined questions. Their answers may require that you go back to earlier sections to insert comments and change the consensus as it grows.
- Trust in the group and work together to allow the final document to emerge. Be sure that the members of the Drafting Group are all comfortable with the results.

It is exciting and rewarding to have a written product at the end of the event. But don't promise more than the Drafting Group can produce. The Consensus Document may not meet the group's long-term goal, but may instead be a record showing this point in the process of bringing many different stakeholders together to prioritize children, families, and communities.

The Drafting Group meets when others are having a break, are enjoying educational or entertaining programs, or have gone home. Be sure that members of this group are willing to give up their free time and fully prepared to attend all sessions. Consistent attendance of the Drafting Group is important to the quality of the final product.

G. Review Consensus Document

Time needed:	.5 to 1.5 hours
Preparation needed:	Same as A and D, above
Who participates:	Full Group, staffed by Moderator (and, if further drafting is to be done after this session, a member of the Drafting Group who serves as Recorder)
Materials needed:	➪ Public address system ➪ Copies of Consensus Document for all participants or document outline on flip chart ➪ If further drafting is to be done after this session, computer or flip chart and markers
Desired outcome:	➪ Share Consensus Document ➪ If further drafting is to be done on the document, gather participants' suggestions for changes that would be needed to fully capture their shared views
Process notes:	➪ Distribute copies of the draft Consensus Document or display the flip chart outline. ➪ The Moderator or other designated participants read the document out loud. If further drafting is to be done: ➪ The Moderator invites discussion of whether the document accurately represents the Full Group's shared views. (Use a process similar to the Reporting and Consensus Session, above.) ➪ The Recorder takes careful notes for the Drafting Group, showing participants' reactions and suggestions for changes. ➪ If drafting is to continue following the event, tell all participants who will do that work and how they can have input.

77

H. Closing Celebration

Time needed: .5 to 1 hour

Preparation needed: Same as A and D, above
- All previous parts of event completed
- Obtain materials (below) and prepare room

Who participates: Full Group, staffed by Moderator

Materials needed:
- ➪ Public address system
- ➪ Copies of Consensus Document or outline on flip chart
- ➪ Decorations
- ➪ Snacks / desserts

Desired outcome: Celebrate success of Shared Leadership Event

Process notes:
- ➪ This activity usually takes place at the end of the Review Consensus Document session, after participants have seen the output of their Critical Questions Discussions and have a sense of their shared views and commitment to a common goal.
- ➪ Regardless of how the event may or may not have met all of the Planning Team's expectations, there will be much to celebrate upon completion of the event. It is a good idea to have festive decorations, fun food, and an enjoyable activity, but the closing should be short—participants will most likely be tired and ready to go home.
- ➪ The Moderator should:
  - Explain what will happen next with the Consensus Document and the Shared Leadership process, and that this event is only the beginning.
  - Identify the people who will be working on the next steps and ask for others who would like to be involved.
  - Make a public commitment to include participants as the process goes forward, including all voices and those who may have expressed disagreement with others' opinions.
  - Say when participants will be contacted next.
  - Thank all those who made the event possible, specifically, by name, including staff, Planning Team members, funders, those who provided space or services, etc.
  - Thank participants powerfully and enthusiastically.

When closing out the Shared Leadership Event, everyone should celebrate all outcomes of the event, beyond the production of the Consensus Document. The document is a concrete accomplishment, but the invisible results of the event—the relationships, energy, and connections made during the process—may be even more memorable for participants. These can be the most powerful tools in bringing about change, and having forged them, participants leave the Shared Leadership Event having begun change already.

"I was really touched by the stories. Policymakers need to hear real-life stories. They need to hear about the success stories of families. It was a good thing to hear about their life journeys. Not only did we learn about the programs out there that help these individuals to get to the different stages of their life, but you also learn that there is hope."

Adriana Pecina
Ewing Marion Kauffman Foundation Shared Leadership Event Participant

"The meeting was a powerful and an empowering experience. I have never been through a process quite like that—actually working together, bringing your thoughts, philosophies, and beliefs all together, and really getting something at the end in such a short period of time."

Anna Green
Parent Leader
Shared Leadership Event Participant

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After the Event

Although you may be exhausted by the end of your Shared Leadership Event, it is important that you follow up with participants. Many people have been through processes and events before and been disappointed with the lack of follow-up. A Shared Leadership Event is different. It commits you to respect and inclusion–before, during, and after the event.

Contact all participants and sponsors with thanks and words of celebration. If the document was not a final product and the Drafting Group is to continue its work, be sure its members continue to be representative of the participants and their viewpoints. Finish the document quickly and distribute it to the entire list of participants and others involved (partner organizations, funders, etc.). Welcome feedback and corrections so that everyone knows that the final Consensus Document will remain true to the Shared Leadership Event.

80

Find Ways to Use Your Consensus Document

In creating and distributing the final Consensus Document, you will find that new uses for it will emerge. Keep the entire group informed of these developments. See the "We Did It!" boxes below for examples of how you might use your Consensus Document as you continue your efforts to strengthen families.

WE DID IT

Consensus Document: How We Used It — **Neighborhood**

Hope Neighborhood Association used its Consensus Document, a vision statement, to forge new partnerships, get people excited about its work, and get resources. The document became the core text for a proposal for foundation investment. As its planning and action continue, Hope Neighborhood Association used its Consensus Document to reach out and enlarge the group of people involved in its efforts.

WE DID IT

Consensus Document: How We Used It — **Local Program**

The Family Center shared its Consensus Document, a plan for a new program for families, when discussing the program with other agencies and providers who could help shape it. Each family involved with the planning told others in the neighborhood about the new program and about their positive experience with The Family Center.

WE DID IT

Consensus Document: How We Used It — **National Organization**

We the People used its Consensus Document to create new opportunities for influencing policy at the national, state, and local level. It encouraged participants to share policy efforts and successes with one another so they could be tried in other places. And the organization re-committed to including parent leaders in decision-making and finding ways to increase voting and participation locally.

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A Product Everybody Owns

Some may wonder who "owns" the contents of the Consensus Document. You may publish it under the heading of one organization, but make clear that the product belongs to everyone who participated in your Shared Leadership Event. You may ask for a statement that explains how it was written to appear whenever the document is used, but do not try to limit its replication or distribution. Encourage participants to put this document into circulation rather than onto a shelf!

Take advantage of other event outcomes as well:

- If the event was a first step in a larger process, involve all of the event participants in the entire process.
- Call on one another for help and ask each other for ideas and resources.
- Use your new relationships to improve the lives of your community.

"Be the change you want to see in the world."

–Mahatma Gandhi

Be prepared for surprises. A good Shared Leadership process, one that builds strong relationships, will offer results long into the future. When you increase opportunities for parent leadership, parents, in turn, will demand and take on increased responsibility–for policies, programs, and creating and managing the future for their own, and for *all*, families.

Appendices

Budget Worksheet

Budgets vary widely from one Shared Leadership Event to the next, but you can use the worksheet below to build your own. You will probably find that not all of the budget items and categories below apply to your event.

			# of People	Subtotals
I. OFFICE EXPENSES				
Binders w/tabs			$	
Velobinding			$	
Markers			$	
			Total	$_____
II. CONTRACTUAL SERVICES				
Childcare, Facilitation, van driving, etc			$	
			Total	$_____
III. PRINTING/PUBLICATIONS				
Mailing (postage)			$	
Overnight delivery service			$	
Photocopying			$	
			Total	$_____
IV. TRAVEL EXPENSES				
Ground Transportation	cost per person	x # people	$	
Roundtrip Home to Airport	cost per person	x # people	$	
Roundtrip Airport to Hotel	cost per person	x # people	$	
Bus fare, van rental, etc.	cost per person	x # people	$	
Airfare Average	$	x # people	$	
			Total	$_____
V. LODGING				
Sleeping Rooms				
each night x # there that night	$ per room	x # people	$	
	$ per room	x # people	$	
	$ per room	x # people	$	
	$ per room	x # people	$	
	$ per room	x # people	$	
		Subtotal	$	
		Occupancy Tax 10%	$	
		Hotel Gratuities 5%	$	
			Total	$_____
VI. MEETING COSTS				
Meeting Room Rental				
Audio/Visual Needs				
Day 1				
Full Group Flipchart	$	X # needed	$	
# Work Groups Overhead	$	X # needed	$	
Day 2				
Full Group Flipchart	$	X # needed	$	
Overhead	$	X # needed	$	
LCD Projector	$	X # needed	$	
9x12 Screen	$	X # needed	$	
Mic	$	X # needed	$	
# Work Groups Flipchart	$	X # needed	$	

Day 3					
General Session	Flipchart	$	x # needed	$	
	Overhead	$	x # needed	$	
	LCD Projector	$	x # needed	$	
	9x12 Screen	$	x # needed	$	
	Mic	$	x # needed	$	
# Work Groups	Flipchart	$	x # needed		
Day 4					
General Session	Flipchart	$	x # needed		
	Overhead	$	x # needed	$	
	LCD Projector	$	x # needed	$	
	9x12 Screen	$	x # needed	$	
	Mic	$	x # needed	$	
# Work Groups	Flipchart	$	x # needed	$	
			Subtotal	$	
			Service Charge(20%)	$	
			Sales Tax: 6 =%	$	
				Total	$_____
VII. FOOD					
Catering Costs					
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
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Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
Day and Meal	Food Type	$ per meal	# of people	$	
			Subtotal	$	
			Service Charge(20%)	$	
			Sales Tax: 6 =%	$	
Staff meals following event		$ per meal	# of people	$	
				Total	$_____
VIII. OTHER EXPENSES					
Parent Stipends				$	
Child Care Reimbursement				$	
Decorations				$	
Miscellaneous				$	
				Total	$_____
GRAND TOTAL					$_____

Appendix 2

Sample Agenda

Version 1: Neighborhood Seeking Transformation

Events in bold are described in Part 2.

Reaching for a Stronger Future: Sharing Leadership to Build Our Vision
Hope Neighborhood Association

Friday, October 12, 2001

8:30 am	Registration
8:30–9:00 am	Continental Breakfast
9:00–9:30 am	**Introductions & Overview** Moderator: [Fill in name, title] Presenters: [Fill in: sponsoring organization's president, local business or civic leader, & parent/resident leader]
9:30–10:00 am	**Panel** What Does Transforming Our Neighborhood Mean? [Fill in your own topic] Presenters: [Fill in: funder, service provider, & resident parent] **Critical Questions Instructions** [Presented by Moderator]
10:00–10:15 am	Break
10:15 am–12:00 pm	**Critical Questions Discussion 1**—Work Groups
12:00–1:00 pm	Lunch **Speaker** [Fill in: motivational speaker] Moving Mountains in Your Backyard [Fill in your topic]
1:00–2:30 pm	**Reporting and Consensus Session** **Critical Questions Instructions** [Presented by Moderator]

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2:30–2:45 pm	Break
2:45–4:30 pm	**Critical Questions Discussion 2**–Work Groups
4:30–6:00 pm	**Reporting and Consensus Session**
6:00–8:00 pm	Dinner **Speaker** [Fill in: local policymaker] A Vision for Children and Families [Fill in your "vision" topic]
8:00–11:00 pm	**Drafting Session 1**–Drafting Group

Saturday, October 13, 2001

8:30 am	Continental Breakfast
9:00–10:00 am	Consensus Document draft distributed for review on our own **Speaker** [Fill in: leader from another community sharing its story] **Critical Questions Instructions** [Presented by Moderator]
10:00–10:15 am	Break
10:15 am–12:00 pm	**Critical Questions Discussion 3**–Work Groups
12:00–1:00 pm	Lunch Children's Choir Performance
1:00–1:15 pm	Break
1:15–2:30 pm	**Reporting and Consensus Session**
2:30–4:00 pm	**Drafting Session 2**–Drafting Group Roundtable Discussions and Snacks
4:00–5:00 pm	**Review Session**: Review Vision Statement **Closing Celebration**

Appendix 2

Sample Agenda
Version 2: Local Program

Events in bold are described in Part 2.

Shared Leadership: New Beginnings for Our Young Children
The Family Center Shared Leadership Event

Thursday, March 10, 2002

5:30–6:00 pm	Registration
6:00–7:00 pm	Dinner (with children) **Introductions & Overview** Moderator: [Fill in name, title] Presenters: [Fill in: program director, director of a partner organization, & parent leader] **Critical Questions Instructions** [Presented by Moderator]
7:00 pm	Childcare Opens
7:00–7:30 pm	Break
7:30–9:00 pm	**Critical Questions Discussion 1**—Work Groups

Friday, March 11, 2002

8:30 am	Childcare Opens
8:30–9 am	Continental Breakfast
9:00–10:00 am	**Critical Questions Discussion 1**,—continued Work Groups
10:00–10:15 am	Break

10:15–11:45 am	**Reporting and Consensus Session**
11:45–12:00 pm	Break
12:00–1:00 pm	Lunch **Speakers** Successful School-Community Partnerships [Fill in: director of successful program, parent leader from program] **Critical Questions Instructions** [Presented by Moderator]
1:00–1:15	Break
1:15–3:15	**Critical Questions Discussion 2** –Work Groups
3:15–4:45	**Drafting Session**–Drafting Group Guided Play Activity with Children
4:45–5:00 pm	Break
5:00–5:30 pm	**Review Session** **Closing Celebration**

Sample Agenda

Version 3: National Organization

Events in bold are described in Part 2.

Shared Leadership: Forging a Consensus to Strengthen Families and Communities
We The People Shared Leadership Event

Sunday, February 10, 2002

11:00 am–12:00 pm	Registration
12:00–12:30 pm	Light Lunch
12:15–1:30 pm	**Introductions & Overview** Moderator: [Fill in name, title] Presenters: [Fill in: funder, We The People board member, parent leader, & program provider]
1:30–2:30 pm	**Panel** The State of America's Families and Children–Public Policy Opportunities at the Federal, State, and Local Level [Fill in your topic] Presenters: [Fill in: parent leader, state official, and national family advocate]
2:30–3:00 pm	**Critical Questions Instructions** [Presented by Moderator]
3:00–5:00 pm	**Critical Questions Discussion 1**—Work Groups
5:00–6:00 pm	Break
6:00–6:30 pm	Reception
6:30–7:45 pm	Dinner **Panel** Perspectives on State and Local Policy [Fill in your own topic] Presenters: [Fill in: state and local policymakers]
7:45–9:00 pm	**Critical Questions Discussion 1**,—continued Work Groups
9:00–11:00 pm	**Drafting Session 1**—Drafting Group Only

Monday, February 11, 2002

8:00–8:30 am	Breakfast
8:30–9:00 am	**Speaker** [Fill in: leading state official] The Role of Family Support [Fill in your own topic]
9:00–10:00 am	**Panel** Parents' Role in Public Policy [Fill in your topic] Presenters: [Fill in: parent leaders] **Critical Questions Instructions** [Presented by Moderator]
10:00 am–12:00 pm	**Critical Questions Discussion 2**—Work Groups
12:00–1:15 pm	Lunch **Speaker** [Fill in: local official] Local Experience in Policy Changes [Fill in your own topic]
1:30–2:45 pm	**Panel** State Models, Opportunities, and Challenges in Promoting Family Support [Fill in your topic] Presenters: [Fill in: state agency personnel and parent leaders] **Critical Questions Instructions** [Presented by Moderator]
2:45–3:00 pm	Break
3:00–5:00 pm	**Critical Questions Discussion 3**—Work Groups
5:00–5:45 pm	Break
6:00–7:15 pm	Dinner
7:15–8:45 pm	**Panel** The Role of Fathers in Policies for Families [Fill in your topic] Presenters: [Fill in: fathering program director or leader on a key topic, parent leader, advocate]
7:30 pm–12:00 am	**Drafting Session 2**—Drafting Group Only

Tuesday, February 12, 2002

8:30–10:00 am	Breakfast **Speaker** [Fill in: leading state official] What Do We Know About Parents as a Political Force? [Fill in your topic]
10:00 am–10:30 am	Break
10:30 am–12:00 pm	**Review Session**
12:00 pm–2:00 pm	Lunch **Speaker** [Fill in: motivational family advocate] The Strengths of Families and Family Support [Fill in your topic]
12:30 pm–3:00 pm	**Drafting Session 3**—Drafting Group Only
2:00 pm–3:00 pm	**Special Event** [Fill in theater, music, or other special presentation]
3:00 pm–3:15 pm	Break
3:15 pm–4:00 pm	**Review Session** **Closing Celebration**

Family Support America, formerly Family Resource Coalition of America, promotes family support as the nationally recognized movement to strengthen and support families and places the principles of family support practice at the heart of every setting in which children and families are present. By identifying and connecting individuals and organizations that have contact with families; by providing technical assistance, training and education, conferences, and publications; and by promoting the voice of families, Family Support America is taking family support to scale as the national strategy for ensuring the well-being of our children today and in the years to come.

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